



BRUNEI TOURISM - A DRIVER OF ECONOMIC GROWTH TO ACHIEVE WAWASAN 2035

A MARKETING STRATEGY
FOR BRUNEI MY SECOND
HOME (BM2H)

BRUNEI THE BEACON OF ASIA :
LIVE, INVEST AND RETIRE



کمنترین سومبر۲ اوتام دان قلنچوغن
MINISTRY OF PRIMARY RESOURCES AND TOURISM
BRUNEI DARUSSALAM





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OIC Financial Tower and Brunei Tourism Island

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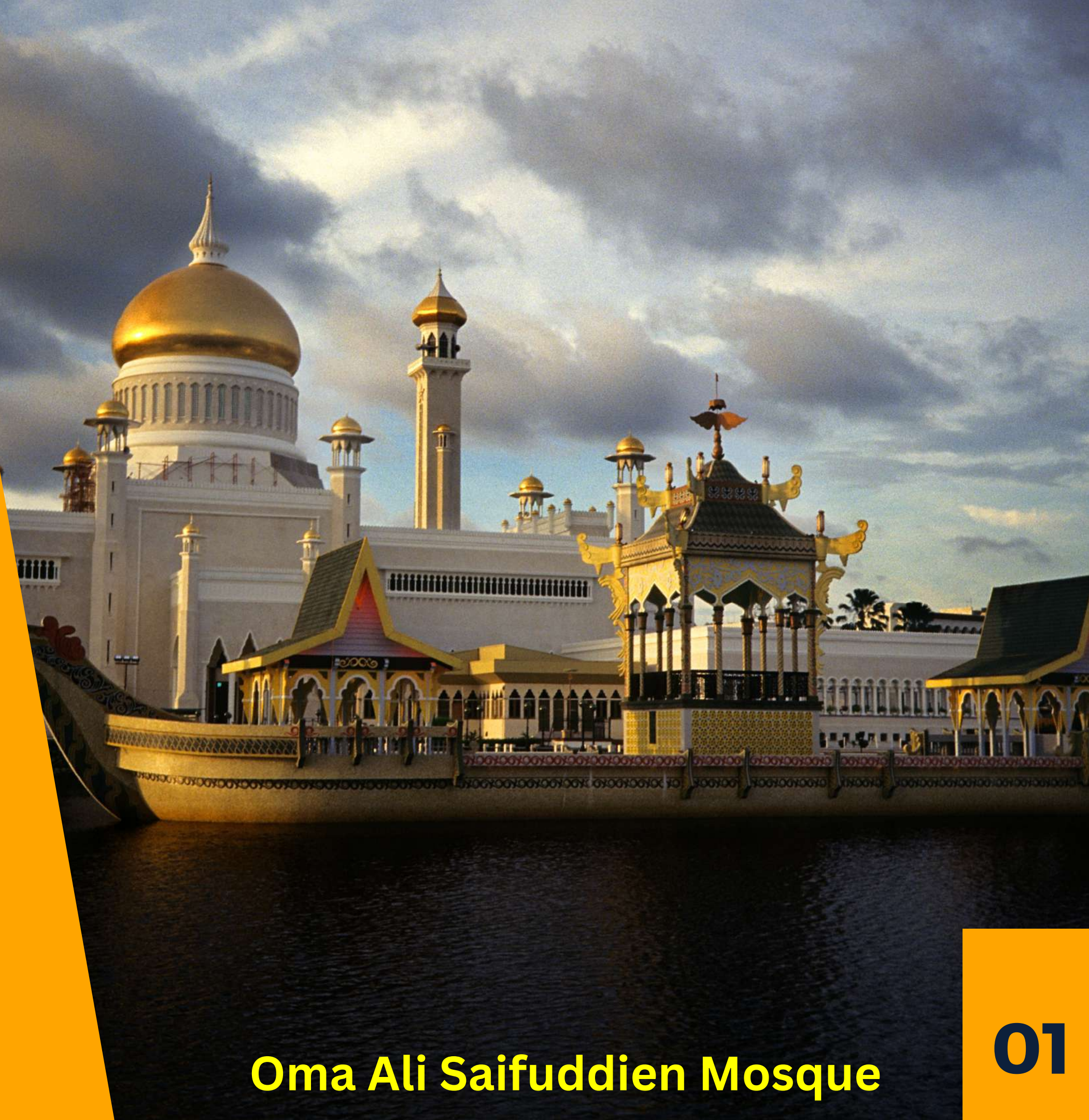


Royal Brunei Airlines



BRUNEI: THE ABODE OF PEACE

Brunei is a country situated on the north coast island of Borneo with a land area of 5,765 km² (576,500 Hectares). It is divided into 4 powerful districts namely Brunei Muara, Belait, Tutong, and Temburong with only a population of approximately 500,000 locals and approximately 250,000 foreign immigrants and tourists.



Oma Ali Saifuddien Mosque

THE REIGN OF A BENEVOLENT KING

Under His Majesty's reign, Brunei has undergone unprecedented socio and economic transformations and continue to enjoy both political and economic stability. As a result, Brunei has achieved a high Human Development Index under the Millennium Development Goals. His Majesty commissioned the future development of Brunei with Wawasan Brunei 2035 (Brunei Vision 2035) that set achievable goals for an increased quality of life and a dynamic sustainable economy.



His Majesty Sultan Hassanal Bolkiah

KOPERASI BUMIPUTERA BERSATU BERHAD (KBBB)

KBBB was launched in October 2006 with the objective of enhancing the social and economic welfare of its members and the community. The organization was formed to foster great cooperation between the different layers of the Brunei community and to improve the cooperative movement by working with local, regional, national, and international entities. KBBB helps promote Brunei's socio-economic development to improve quality of life, generate employment opportunities, add value to the economy, and help develop a sustainable economy.

On June 18, 2014 KBBB was authorized by His Majesty Sultan Hassanal Bolkiah, through the government department (Brunei Industrial Development Authority - BIDA), for Brunei Vision 2035 projects as a major developer to strategically source, organize, and manage projects and infrastructures. His Majesty Sultan has authorized KBBB with the ability to identify and propose projects that will enhance and complement the objectives of Brunei Vision 2035.



**His Majesty Sultan Hassanal Bolkiah
with KBBB Founder Dato Ang Bawai Munjil**

**His Majesty
Sultan
Hassanal
Bolkiah
with KBBB
Founder
Dato Ang
Bawai Munjil**



WAWASAN 2035

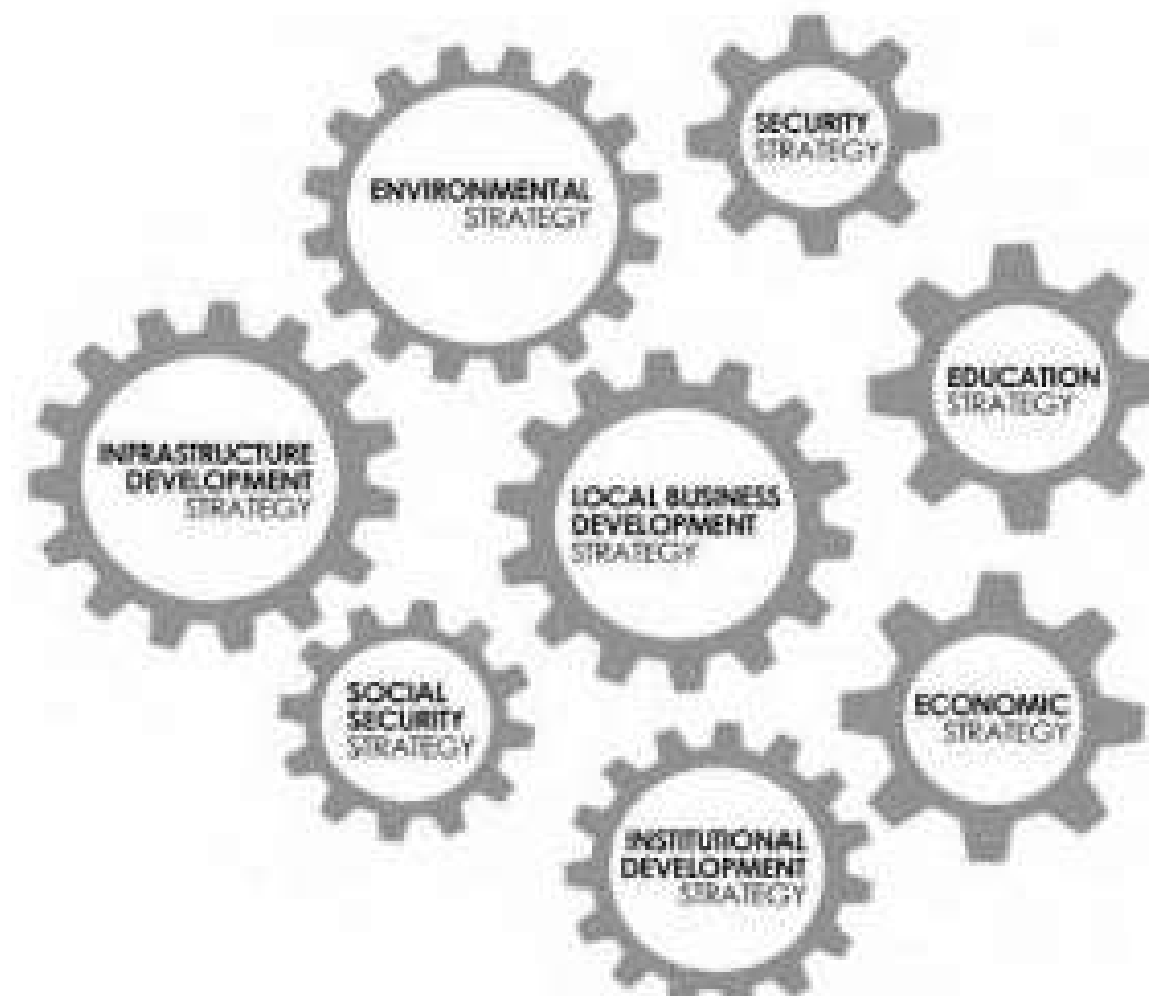
Three Ultimate Goals of Wawasan 2035:
Firstly, in aspiring for a highly well-educated, skilled, and accomplished people as measured by the highest international standards.
Secondly, enjoying a high quality of life among the top ten countries in the world.
And thirdly, having a dynamic and resilient economy which is ranked among the world's top ten countries in terms of per capita income but also self-sufficient and sustainable

WAWASAN BRUNEI 2035

By 2035, Brunei Darussalam aims to be recognised for:

- The accomplishments of its well-educated and highly skilled people
- Its population living with high quality of life
- A sustainable and dynamic economy

We will need to develop and implement an integrated and well-coordinated national strategy comprising of the following key elements:



Under Wawasan 2035, Brunei aims to be one of the Top 10 nations in the world recognised for its **Quality of Life**.



Politically and Economically Stable

No History of Natural Disasters

No History of Terrorism related incidents

#7 in Asia for Best Living Standard (Moner Report 2011)

#16 in the world for High Pay and Productivity (GCR 2011-12)

BRUNEI A GLIMPSE OF THE ECONOMY

Brunei is the fourth-largest oil producer in Southeast Asia. Oil accounts for around 62 percent of GDP and is the source of 90 percent of government revenues. Yet, in recent years, oil production has declined and, as a result, growth has slowed down. In order to strengthen Brunei's long-term prospects, the government has been trying to diversify the economy by using oil revenues to invest in non-oil industries like Islamic banking and by attracting foreign direct investments. Focus on eco-tourism has also been high, given that 70 percent of the country is covered by tropical forest.

Hengyi PMB Refinery & Petrochemical Project

ECONOMIC DIVERSIFICATION

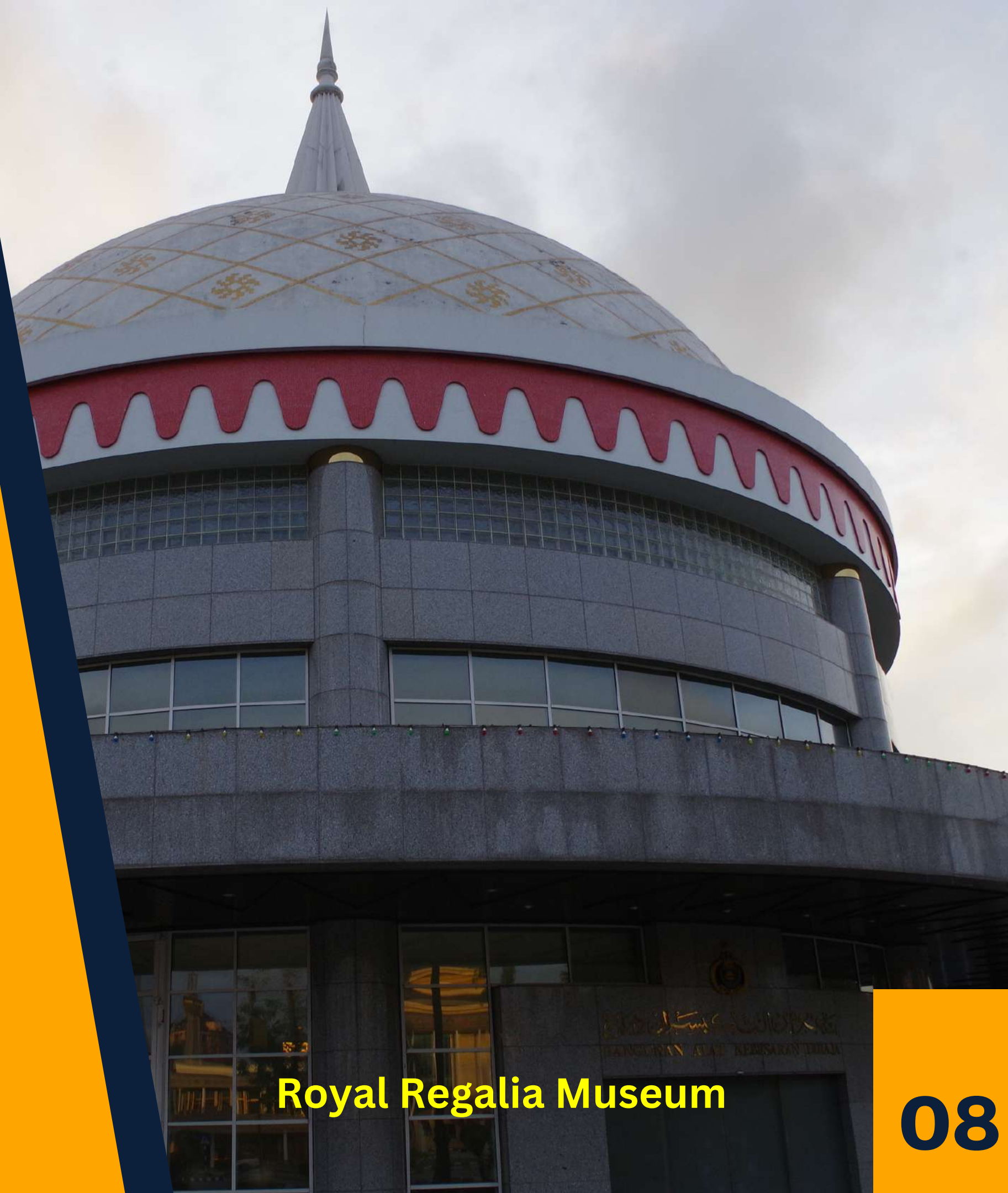
With the price of oil falling and significant worldwide reduced consumption policies, Brunei, a significant oil exporter, is one of the countries to fall victim to an economic reliance on the energy industry, since the majority of Brunei's exports are oil and gas-related and this equates to a significant amount of its Gross Domestic Product. The hydrocarbon-dependent Sultanate now stands on the precipice of economic uncertainty, brought about by the changing policies of energy creation and consumption from world governments and the Covid-19 pandemic. With this predicted long-term decline in oil revenues, an alternative strategy must be implemented; non-oil and gas-related business and recreational tourism.



Kampung Ayer, Village on Stilts

A REVIEW OF BRUNEI TOURISM

Based on the annual report from the Ministry of Tourism , around 250,000 tourists visited the Sultanate in 2015, contributing about BN\$316m (\$224.8m) to the country's GDP, an increase of 5% over 2014. Furthermore, the Ministry of Tourism forecast this contribution will rise by around 2.5% in 2016 and increase by an average of 7.5% per annum through to 2026 to reach around BN\$710m (\$505.2m), or 2.3% of GDP. The total contribution to GDP of the tourism industry was BN\$1.62bn (\$1.2bn), or 7.4% of GDP, in 2015. This is forecast to rise by 6.3% per year to BN\$3.06bn (\$2.2bn) by 2026, accounting for 10% of GDP.



Royal Regalia Museum

BRUNEI TOURISM - PRE PANDEMIC, PANDEMIC AND POST PANDEMIC PERIOD

Over the past 6 years (2016-2021) international visitor arrivals have shown a Compound Annual Growth Rate (CAGR) of **-56.16%** by air, **-100%** by cruise and **-51.58%** by border

International Visitor Arrivals to Brunei, 2016 - 2021



Over the past 6 years (2016-2021) international visitor arrivals have shown a Compound Annual Growth Rate (CAGR) of **-56.16%** by air, **-100%** by cruise and **-51.58%** by border.

Source: Tourism Development Department, Ministry of Primary Resources and Tourism; Immigration and National Registration Department, Ministry of Home Affairs; and Shipping Agencies in Brunei Darussalam.

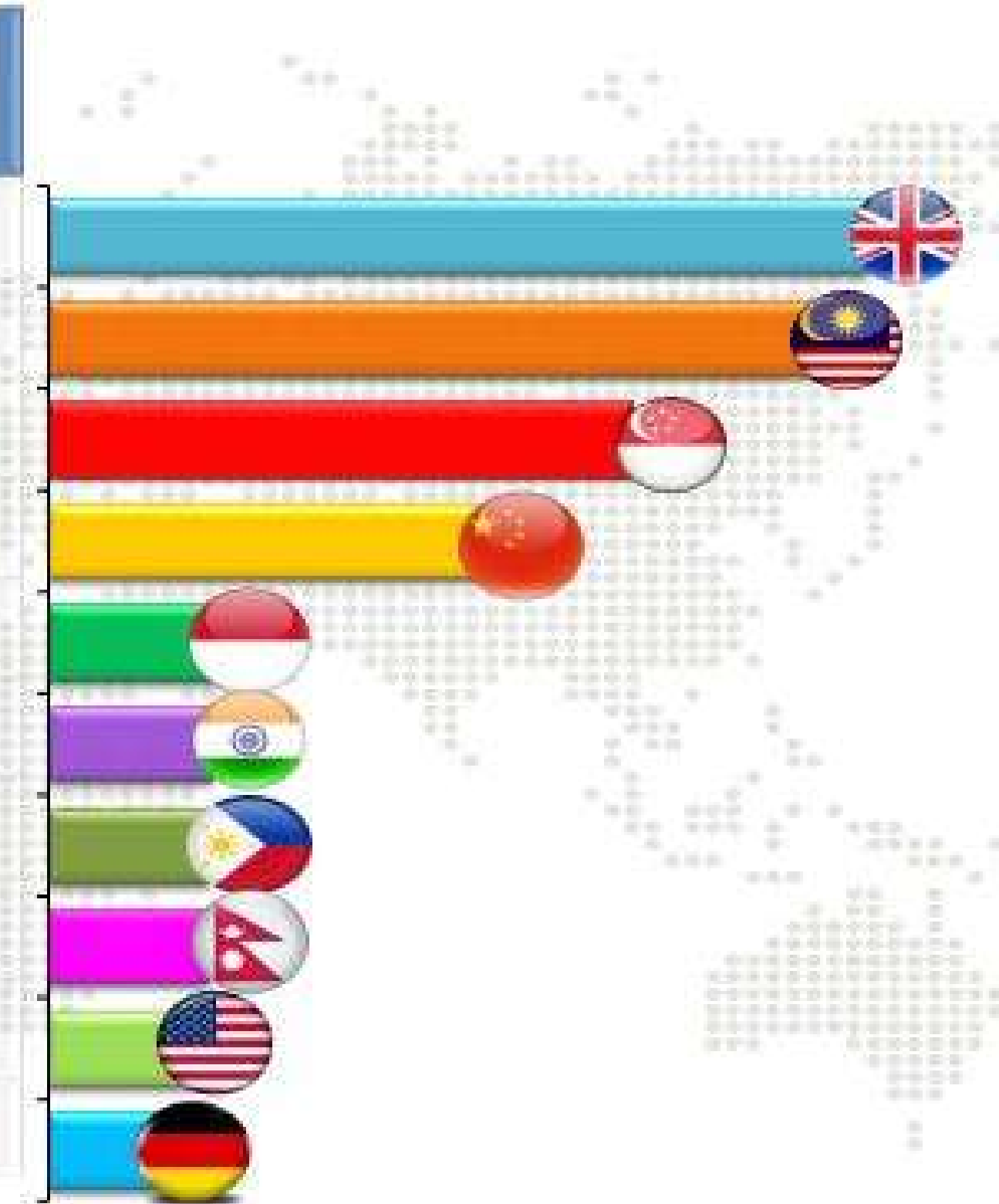
www.bruneitourism.com

INTERNATIONAL TOURIST ARRIVALS FROM TOP 10 COUNTRIES 2020-2021

International
tourist arrivals
from top ten
countries
experienced a
big reduction
from 2020-2021

International Tourist Air Arrivals from Top 10 Countries, 2020 & 2021

Rankings 2020	Rankings 2021	Countries	No. of Arrivals 2020	No. of Arrivals 2021	Growth (Y-O-Y)
5	1	United Kingdom	3,407	604	-82.3%
1	2	Malaysia	16,869	568	-96.6%
7	3	Singapore	2,226	430	-80.7%
2	4	China	11,329	320	-97.2%
3	5	Indonesia	6,262	135	-97.8%
10	6	India	1,750	119	-93.2%
4	7	Philippines	4,562	118	-97.4%
16	8	Nepal	499	118	-76.4%
13	9	United States	851	110	-87.1%
15	10	Germany	527	97	-81.6%



Source: Tourism Development Department, Ministry of Primary Resources and Tourism; and Immigration and National Registration Department, Ministry of Home Affairs.

www.brunaitourism.com

BRUNEIAN TOURISTS SUSTAINED THE COUNTRY'S TOURISM AND TOURISM OF OTHER COUNTRIES

Year	% Contribution to Total Tourists
2016	94.3
2017	93.7
2018	93.4
2019	92.2
2020	94
2021	97



ECONOMIC DIVERSIFICATION: IMPACT OF TOURISM

Tourism has the potential to contribute to employment and enterprise creation.

A major source of foreign exchange needed to import intermediate inputs for industry. It permits countries to lift binding balance of payments constraints thereby making it possible to enhance productive capacities and diversify economies. Tourism revenue also makes it possible for countries to invest in infrastructure which is a driver of diversification and development.

Air transport development has been a determinant factor in promoting not only tourism development but also diversification through making it possible for certain domestically produced goods to reach foreign markets.

Tourism is a cross-cutting sector and as such strategies to promote it should be developed jointly with other development strategies such as in agriculture, industry, finance, and the labour market.



Twelve Roofs House, Bubungan Dua Belas

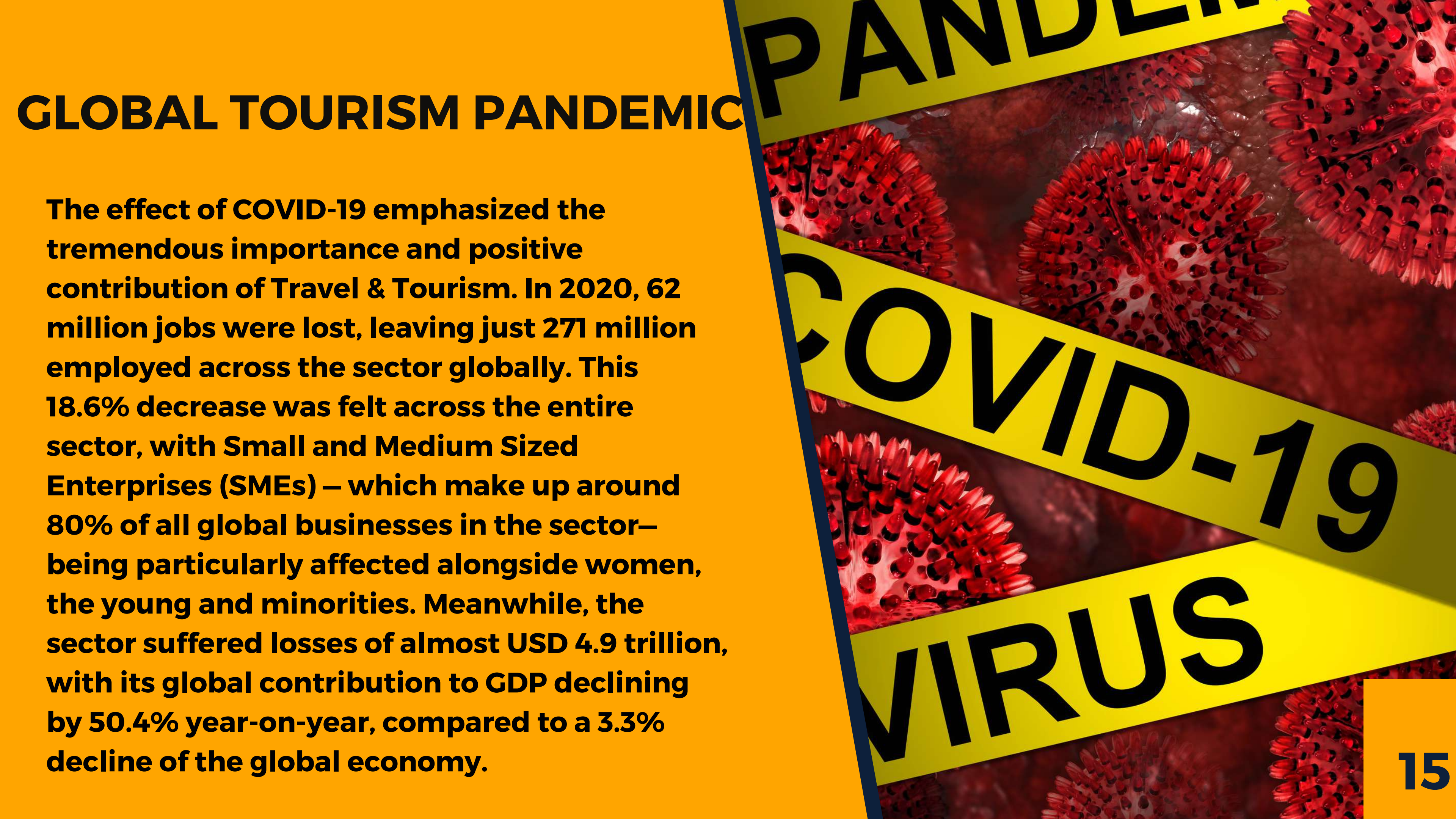
A REVIEW OF GLOBAL TOURISM



GLOBAL TOURISM PRE-PANDEMIC

Prior to the pandemic, Travel & Tourism (including its direct, indirect, and induced impacts) was one of the world's largest sectors, accounting for 1 in 4 of all new jobs created in the world, 10.3% of all jobs (333 million), and 10.3% of global GDP (USD 9.6 trillion). Meanwhile, international visitor spending amounted to USD 1.8 trillion in 2019 (6.8% of total exports).

Travel & Tourism enables socio-economic development, job creation and poverty reduction. This in turn drives prosperity and significant positive social impact, providing unique opportunities to women, minorities, and young people. The benefits of Travel & Tourism spread far beyond its direct impacts in terms of GDP and employment, with indirect gains extending through the entire travel ecosystem as well as the supply chain linkages to other sectors.



GLOBAL TOURISM PANDEMIC

The effect of COVID-19 emphasized the tremendous importance and positive contribution of Travel & Tourism. In 2020, 62 million jobs were lost, leaving just 271 million employed across the sector globally. This 18.6% decrease was felt across the entire sector, with Small and Medium Sized Enterprises (SMEs) – which make up around 80% of all global businesses in the sector—being particularly affected alongside women, the young and minorities. Meanwhile, the sector suffered losses of almost USD 4.9 trillion, with its global contribution to GDP declining by 50.4% year-on-year, compared to a 3.3% decline of the global economy.

GLOBAL TOURISM POST PANDEMIC

However, the future outlook is positive, the sector is once again showing its resilience and ability to bounce back. Despite the difficulties the sector has been facing, the projections point to a strong decade of growth. Travel & Tourism GDP is set to grow on average by 5.8% annually between 2022 and 2032, outpacing the growth of the overall economy (2.7% per year). Travel & Tourism GDP is also projected to return to 2019 levels by the end of 2023.



WORLD TRAVEL & TOURISM 2019, 2020 & 2021

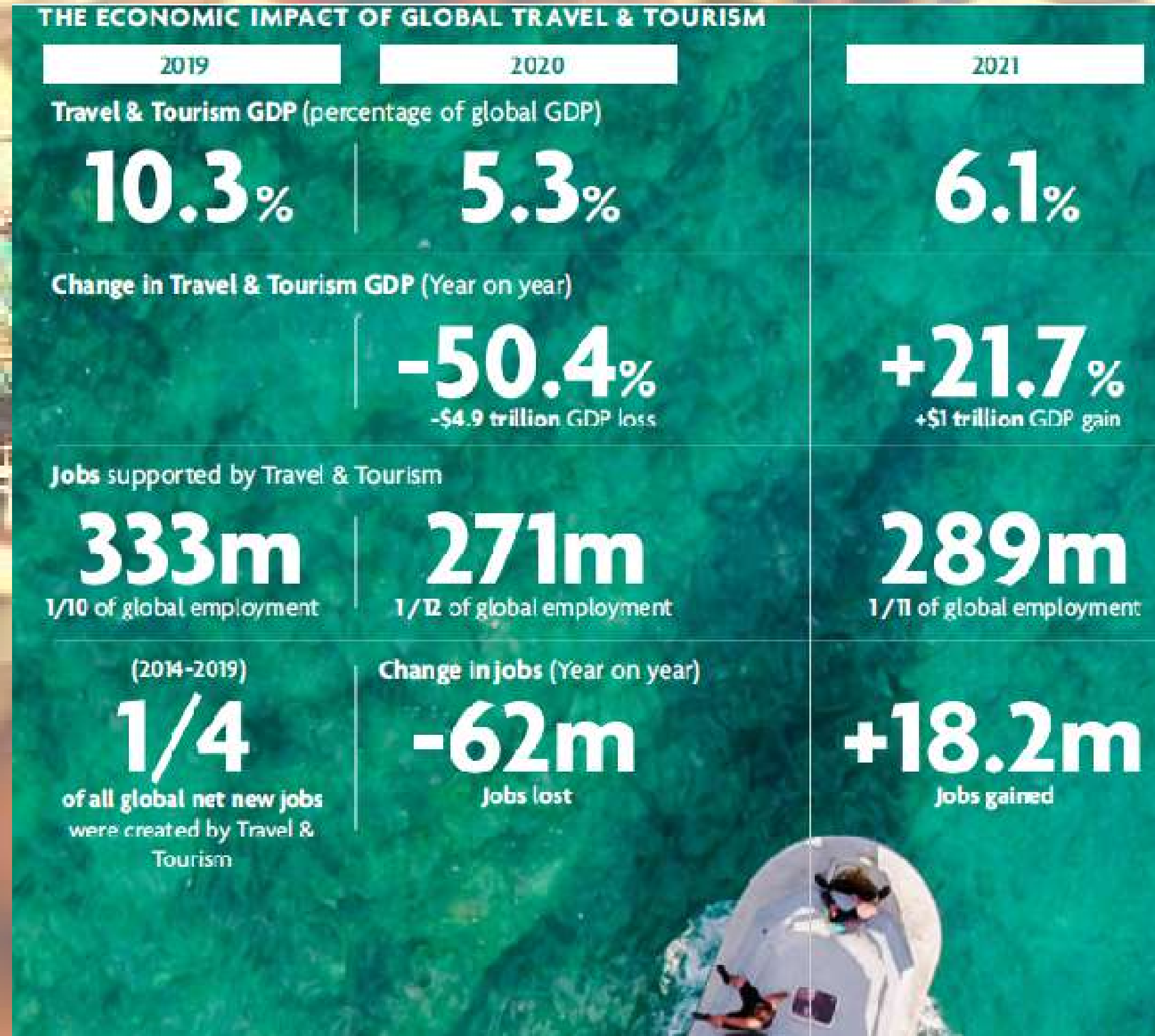


Chart from WTTC Annual Report

DOMESTIC TRAVEL SUPPORTED TOURISM RECOVERY

Figure 2 of the WTTC shows that the global Travel & Tourism's recovery was supported more by the rise in the spending by domestic visitors than revenues from international visitors. Travel & Tourism domestic spending recovered strongly – by 31.4% globally – whereas spending by international visitors recovered by only 3.8% as travel restrictions for foreign visitors remained in place across many countries.

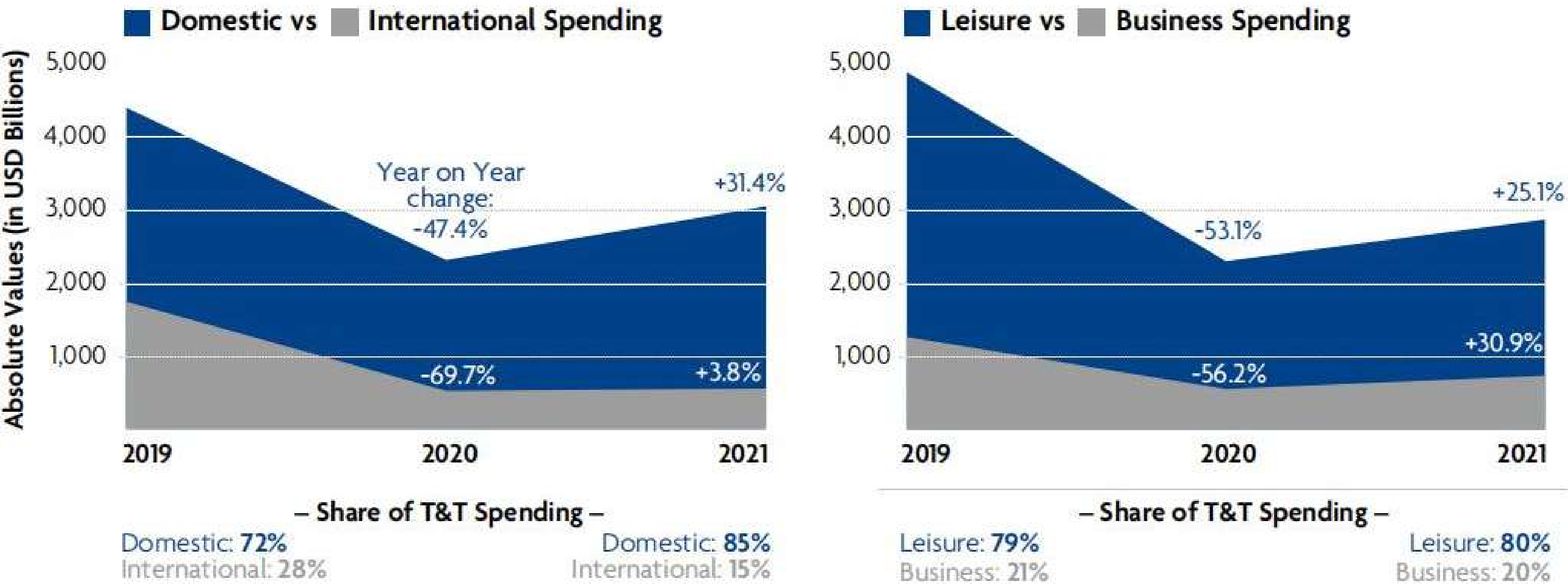
As a result, domestic spending's share of total Travel & Tourism spending increased from 72% in 2019 to 85% in 2021.

Travel & Tourism business spending and leisure spending grew at 30.9% and 25.1% respectively



GLOBALLY - DOMESTIC TRAVEL SUPPORTED THE RECOVERY OF TOURISM

Figure 2: Sector Characteristics



A REVIEW OF REGIONAL TOURISM



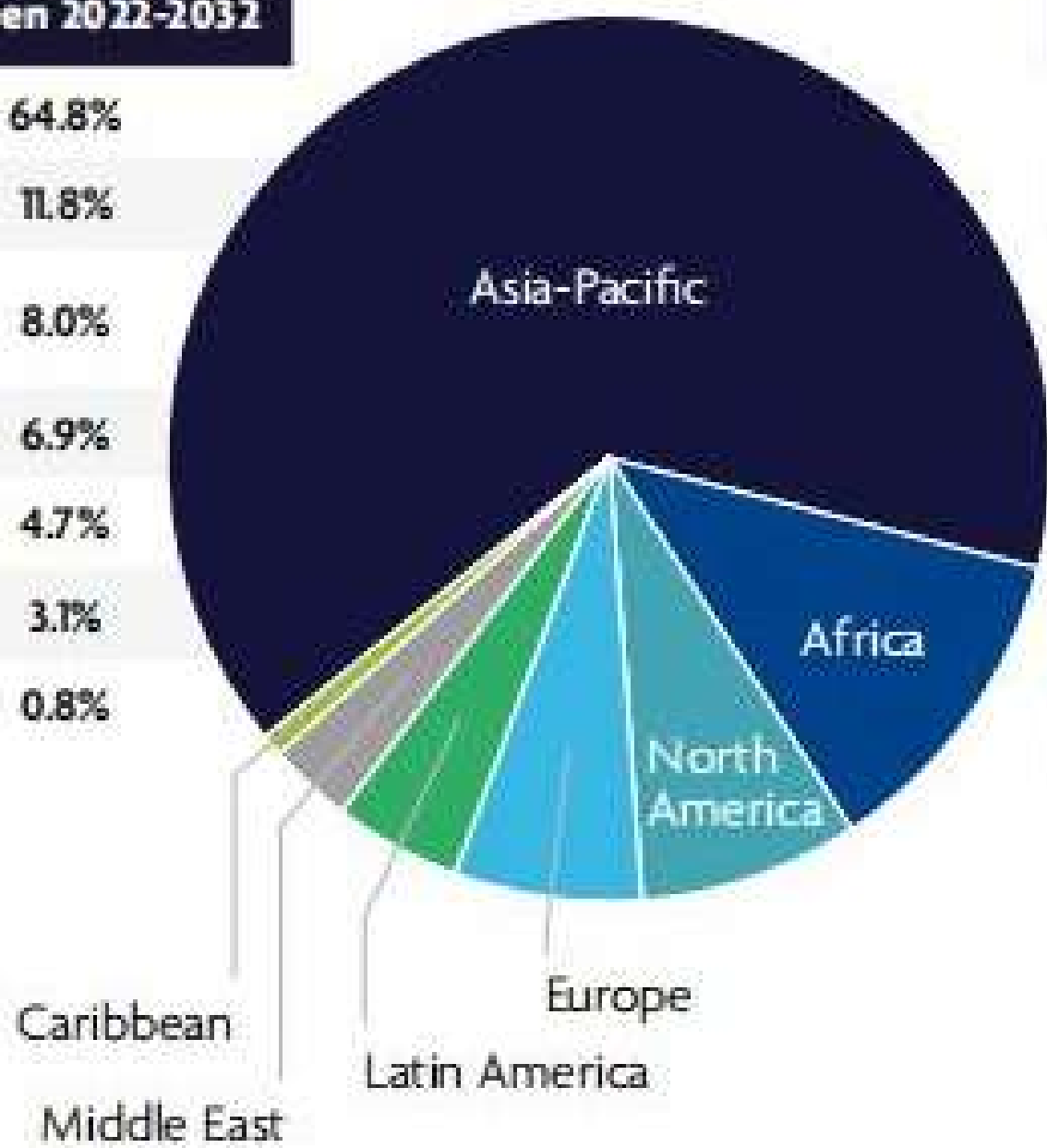
REGIONAL
HIGHLIGHTS

REGIONAL TOURISM

In 2022, as travellers' confidence improves, the global Travel & Tourism sector is estimated to hasten its pace of recovery to 43.7% compared to 2021. The sector is likely to return to pre-pandemic levels around the end of 2023 and the preliminary data for the first half of 2022 supports this forecast. Looking at a longer-term forecast, between 2022 and 2032, Travel & Tourism's contribution to the global economy is expected to grow at an average annual rate of 5.8% which is more than double the 2.7% average annual growth rate estimated for the global economy. In that same period, the sector is forecasted to generate 126 million additional jobs.

ASIA PACIFIC SHOWS MOST INCREASE IN TRAVEL & TOURISM FORECAST. IT WILL ALSO CREATE THE MOST JOBS

Region Rank	% of new T&T jobs Between 2022-2032
1 Asia-Pacific	64.8%
2 Africa	11.8%
3 North America	8.0%
4 Europe	6.9%
5 Latin America	4.7%
6 Middle East	3.1%
7 Caribbean	0.8%



Country Rank	% of new T&T jobs Between 2022-2032
1 China	25.5%
2 India	20.4%
3 United States	5.3%
4 Indonesia	4.2%
5 Thailand	2.8%
6 Philippines	2.5%
7 Mexico	2.3%
8 Others	37.0%

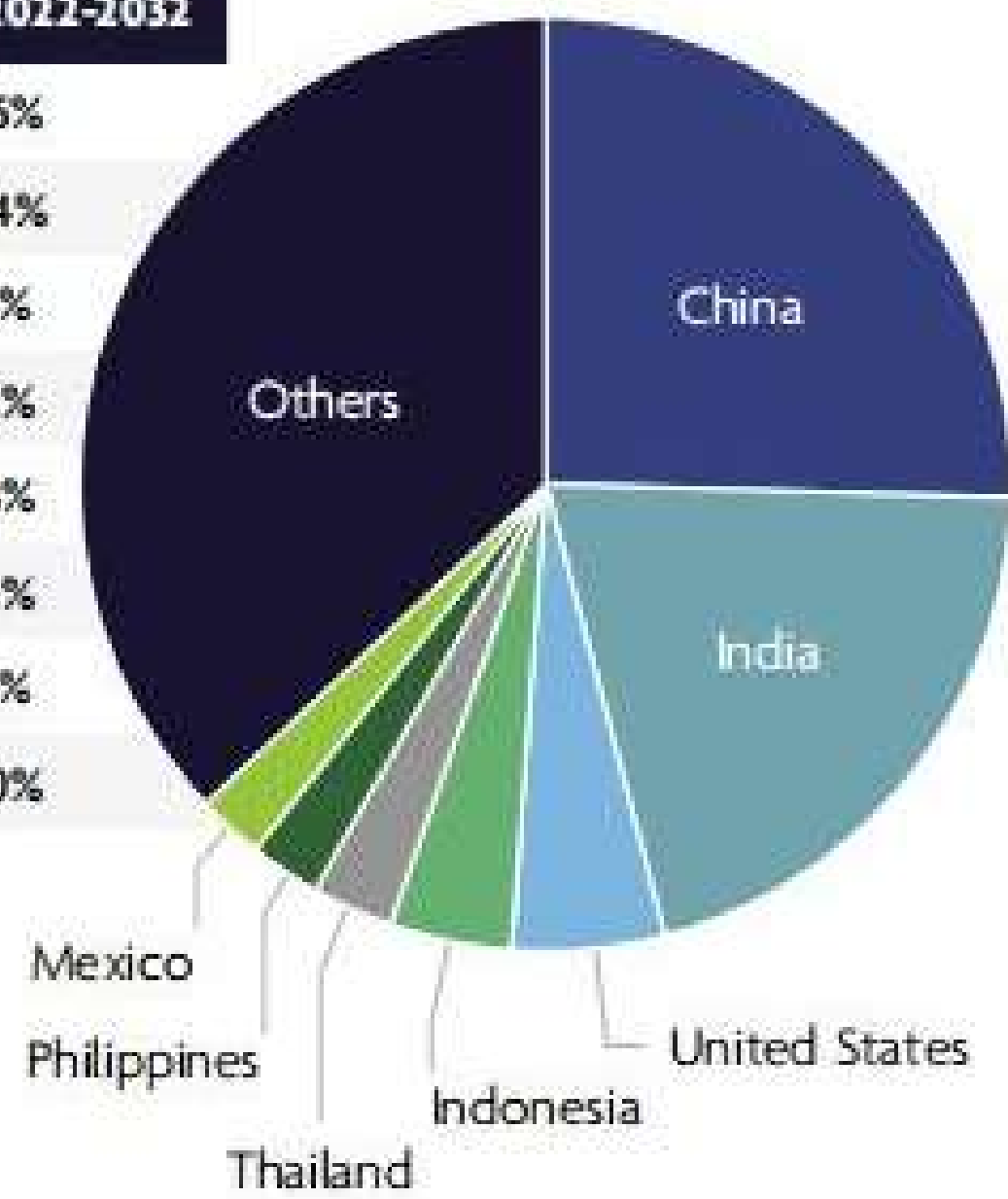


Figure 9 from WTTC Annual Report

ASIA PACIFIC SHOWS MOST INCREASE IN TRAVEL & TOURISM FORECAST

Asia-Pacific is forecasted to be the first region to revert to the 2019 scenario (in 2023), while all the other regions are estimated to recover completely in 2024.

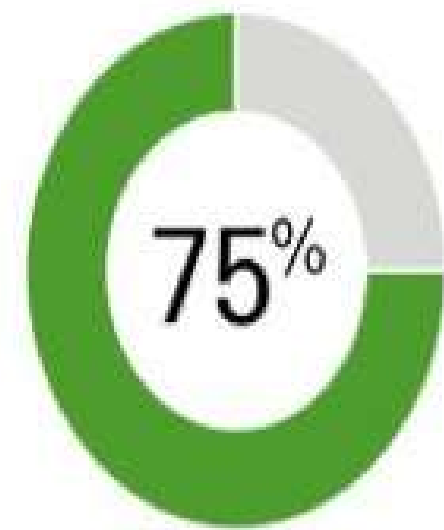
Many of these new jobs in Travel and Tourism will be concentrated in the Asia-Pacific region (64.8%) in general, and China (25.5%) and India (20.4%) in particular.



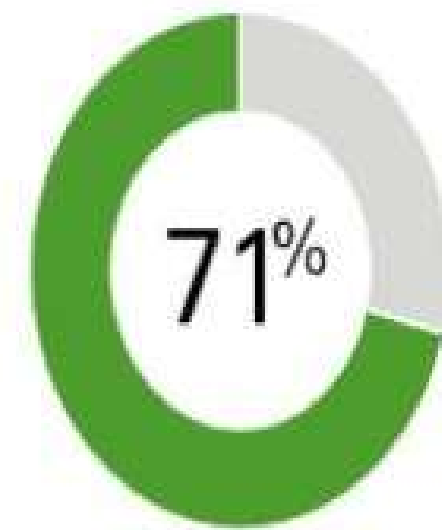
ASIA PACIFIC SHOWS A PROMISING FUTURE FOR SECOND HOMES



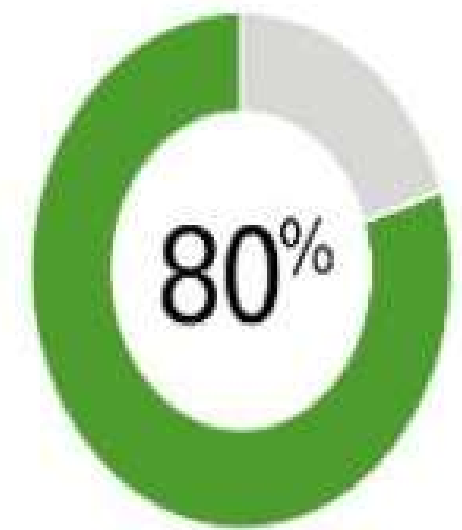
65% of expats are feeling optimistic about the year ahead.



75% of expats are optimistic 'normality' will return.



At 71%, Asia ranked as the highest region for optimism about the year ahead.



4 out of 5 expats say they will continue living in their host country for the next year at least.

HSBC Expat's Explorer Survey of 2021 confirms that 71% of all expats who joined the 2021 survey ranked ASIA as the highest region where they showed optimism of pandemic recovery and 80% of them said they will continue to live in that host country in the future.

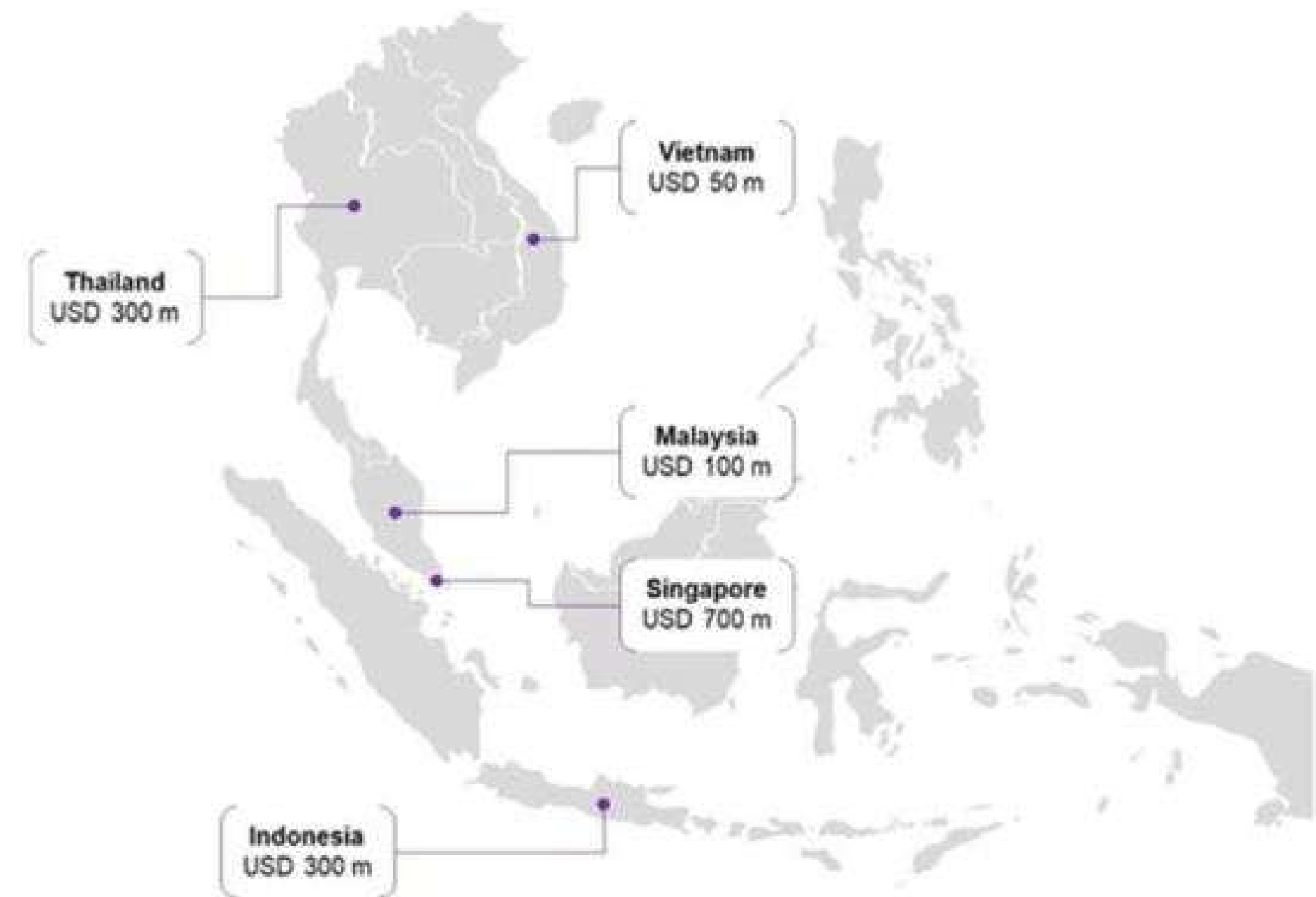
• ASEAN LEADING TOURISM RECOVERY • IN 2022

According to Jones Lang LaSalle Report, Southeast Asia is paving the way for tourism recovery in Asia Pacific and is expected to record USD1.5 billion of hotel investment volume for 2022.

In the first two months of 2022, Southeast Asia has welcomed more than 580,000 international visitors in total, a substantial +102% increase year-on-year. The positive data from the beginning of 2022 are encouraging Southeast Asian countries to set ambitious targets for the year: Vietnam is aiming to welcome 5 million international tourists this year, Thailand is expecting 5.5 million and Indonesia, 3 million. The Philippines is expecting 2 to 5 million international tourists in 2022.

More specifically, Singapore and Indonesia are expecting to record the highest y-o-y growth in 2022 as measured by investment volumes.

Figure 2: JLL Forecast: Hotel Investment Volume 2022 – Southeast Asia



Source: JLL

ASEAN GETTING READY FOR THE 4TH INDUSTRIAL REVOLUTION

ASEAN Development Outlook (ADO) report of 2021 expounded on SEA's readiness for the 4IR concluding that under the momentum of the world's largest labor force, the ASEAN Region is forecast to become the **WORLDS FOURTH LARGEST REGIONAL ECONOMY WITHIN 30 YEARS.**

INDUSTRIAL REVOLUTION



ASEAN LED SUCCESSFUL POVERTY REDUCTION EFFORTS

The ADO Report further commended ASEAN efforts over the last two decades for making tremendous progress in tackling poverty. At the turn of the century, just over a third (34.3%) of the population fell below the International Poverty Line. By 2018, only 3.3% of ASEAN's citizens remained below the poverty line.

Malaysia & Thailand succeeded in eliminating poverty at the end of the 20th century.

Indonesia and the Philippines (ASEAN's two most populous countries) have made it after 1999 while LAO PDR, Myanmar & Vietnam are making rapid progress in reducing poverty levels.

Table 0.1 Proportion of people below the \$1.90 poverty line and related statistics

\$1.90 2011 PPP	Ave monthly income		Pov headcount		Population		Total below pov line (mil)	
	1999	2018	1999	2018	1999	2018	1999	2018
Indonesia	78	199	41.7	4.6	208.6	267.7	87.0	12.4
Lao PDR	78	154	45.5	8.6	5.2	7.1	2.4	0.6
Malaysia	464	982	1.2	0.0	22.7	31.5	0.3	0.0
Myanmar	39	187	86.9	1.5	46.2	53.7	40.1	0.8
Philippines	163	209	15.9	4.6	76.3	106.7	12.1	4.9
Thailand	255	469	2.5	0.0	62.3	69.4	1.6	0.0
Viet Nam	92	319	35.7	1.9	79.0	95.5	28.2	1.8
ASEAN 7*	34.3	3.3	500.4	631.6	171.7	20.6

* Data not available for Brunei, Cambodia and Singapore.

Source: World Bank (2020c) and authors' calculations

Last accessed, 2 July 2020

ASEAN LED SUCCESSFUL SDG GOALS ATTAINMENT

In comparison to other sub-regions in Asia and the Pacific, ASEAN has led the way in quality education (SDG4), Affordable and Clean Energy (SDG7), and Industry, Innovation and Infrastructure (SDG9)

The United Nation Population Forecasts that the ASEAN Population is a burgeoning young population and is a key development driver of the latter half of the 20th century as ASEAN earmarks its population of about 800 M by 2062.

sustainable
cities and
communities

zero
hunger

peace, justice,
and strong
institutions

decent work
and
economic
growth

affordable
and
clean
energy

SDG

clean
water
and
sanitation

partnerships
for
the goals

life
below
water

quality
education

industry,
innovation
and
infrastructure

climate
action

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THE PROSPECTS OF TOURISM IN ASEAN: BENCHMARK REVIEW

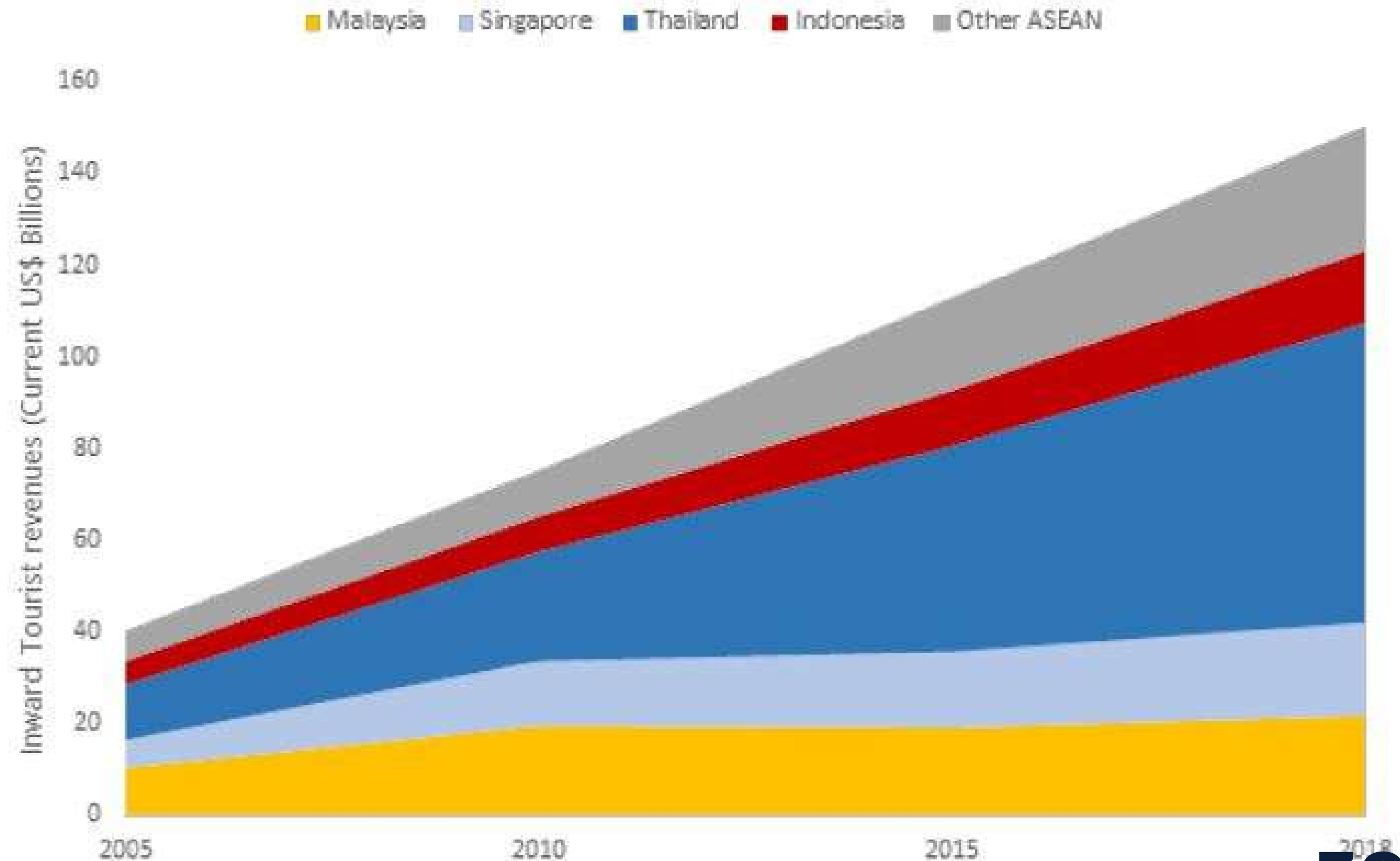




TOURISM CONTRIBUTION TO ASEAN GDP

Tourism is a core activity across the ASEAN region and makes a significant contributions to GDP in every country. Tourism is also a source of livelihood for those in the tourism service industry. Figure 2.14 of the ASEAN Development Outlook Report of 2021 shows the estimated contribution of tourism to the GDP of Southeast Asia, growing steadily between 2010 and 2019 .

Figure 2.14: Contribution of tourism to GDP across Southeast Asia, 2010–2019



Source: Authors' based on World Bank (2020e) data

INDONESIA: POWERHOUSE OF ASIA

Indonesia is the largest archipelago in the world. It consists of five major islands and about 30 smaller groups. The islands are located at a crossroads between two oceans, the Pacific and Indian Oceans, and straddles two continents, Asia and Australia/Oceania. Its strategic location in maritime Southeast Asia has always shaped the cultural, social, political and economic life of the country, which only gained independence from the Netherlands in 1949.

Influenced for centuries by Indian culture, which brought Hinduism and Buddhism, the archipelago gradually adopted Islam between the 13th and 16th centuries.



Pura Besakih Temple, Bali, Indonesia

INDONESIA: MAKING IT TO TOP 4 OF THE TOP 10 WORLDS MOST POPULAR TOURIST DESTINATIONS

Tripadvisor's newly unveiled Travellers' Choice Awards for Destinations – After taking traveller reviews and ratings into account for a 12-month period between November 2020 and October 2021

10 highest-rated and most-loved spots in the world are:

- 1- Dubai, United Arab Emirates
- 2- London, United Kingdom
- 3- Cancún, Mexico
- 4- **Bali, Indonesia**
- 5- Crete, Greece
- 6- Rome, Italy
- 7- Cabo San Lucas, Mexico
- 8- Istanbul, Turkey
- 9- Paris, France
- 10- Hurghada, Egypt



Borobudur Temple, Java, Indonesia

INDONESIA: THE NEXT INDUSTRIAL PRODUCTION POWERHOUSE

Ernst and Young considered Indonesia as the next emerging market economy, with reasonably sophisticated financial systems, controlled inflation and soaring, youthful populations – Indonesia figures prominently on investors' radars. A nation of 260 million people that is recording GDP growth in excess of 5% a year, 3.6% controlled inflation rate since 2017 and 2.5% fiscal deficit with a solid current account surplus. Indonesia also boasts a large and growing middle-class consumer base which is an attractive proposition for foreign direct investors.

It is the 3rd fastest-growing economy behind India & China.

The new capital in Kalimantan is expected to have a total of 100M in population.



Jakarta, Indonesia

THAILAND:

NOW EVEN MORE AMAZING

Thailand is situated in the heart of Southeast Asia, bordered by the Laos PDR and Cambodia in the east; the Gulf of Thailand and Malaysia in the south; the Andaman Sea and Myanmar in the west; and Laos and Myanmar in the north. It is spread over 513,120 sq km

Thailand has the fourth largest consumer market in ASEAN. Its unemployment rate is at a low one percent and the country has a purchasing power of an estimated US\$6,000.

Thailand is home to Buddhist temples, exotic wildlife and spectacular islands. It is also known for its fascinating history, unique culture and delectable local food. The tourism industry plays an important role in the Thai economy and contributes an estimated 18.4 percent to the national GDP. The tourism sector not only depends on foreign visitors but also domestic tourists whose number dwarfs that of foreign tourists. In 2019, Thailand had 39,797,406 visitors.



Grand Palace, Bangkok, Thailand

THAILAND:

LEADING TOURISM RECOVERY

Tourism is an economic contributor to the Kingdom of Thailand. Estimates of tourism revenue directly contributing to the GDP of 12 trillion baht range from one trillion baht (2013) 2.53 trillion baht (2016), the equivalent of 9% to 17.7% of GDP. When including indirect travel and tourism receipts, the 2014 total is estimated to be the equivalent of 19.3% (2.3 trillion baht) of Thailand's GDP.

According to the secretary-general of the Office of the National Economic and Social Development Council in 2019, the government projects that the tourism sector will account for 30% of GDP by 2030.

In 2013, Thailand was the 10th "Top Tourist Destination" in the world tourism rankings with 26.5 million international arrivals.

In 2016, Bangkok ranked 1st surpassing London and New York in Euromonitor International's list of "Top City Destinations" with 21 million visitors.

In 2019, Bangkok ranked 1st surpassing Paris and London in Mastercard's list of "Global Destination Cities Index 2019" with 22.78 million visitors



Wat Arun Temple, Bangkok, Thailand

THAILAND:

LEADING TOURISM RECOVERY

Thailand's economy relies heavily on tourism. In 2019, tourism accounted for approximately 11% of Thailand's GDP, and around 20% of Thais were employed in the sector.

Thailand's GDP declined by 6% in 2020 amid the pandemic-fueled global economic downturn. The National Economic and Social Development Council said since Thailand borders reopened, GDP has risen by 2.4% year on year in the first half of 2022,



Chinatown, Bangkok, Thailand

SINGAPORE: GROWTH DRIVER IN ASIA

Singapore is the smallest Country in South East Asia with a very small population of 5.4 million in an area of 728 Square Kilometers. Singapore has a heavy consumer economy, no oil and gas reserves and no agriculture. In reality Singapore is bereft of the comparative advantage of having rich natural resources. Singapore will be used as a benchmark tourism country for the non-oil & gas country.



Gardens by the Bay, Singapore

Strong Visitor Arrivals boosted hotel, cruise and BTMICE industries

Cruise

Larger ships with more sailings contributed to passenger growth

1.87M Total Passenger Throughput
35% increase

401 Ship Calls
5% increase

11 Maiden Calls

* vs 2017

Hotel

Growth seen across all indicators

S\$4.0B Gazetted Hotel Room Revenue
7.4% increase

S\$219 Average Room Rate
0.9% increase

S\$189 Revenue per Available Room
2.4% increase

86% Average Occupancy Rate
1.2% point increase
* vs 2017

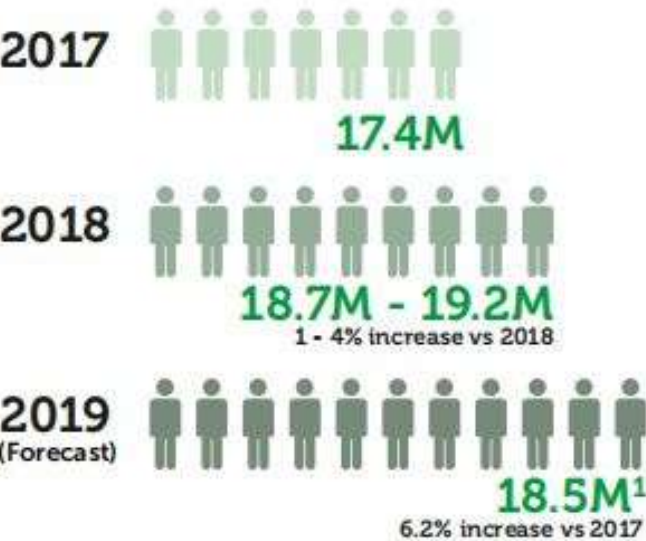
BTMICE

Singapore continues to be a top city for MICE

S\$3.44B Tourism Receipts
10% increase

2.0M Visitor Arrivals
14% increase
* vs YTD 3Q 2017

International Visitor Arrivals in Millions (M)



International Visitor Arrivals in Millions (M)

14 out of top 15 Visitor Arrivals markets recorded growth



International Visitor Arrivals in Millions (M)¹
* vs 2017

- Top 3 Markets: China (+6%), Indonesia (+2%) and India (+13%)
- Significant Growth: China, Germany, India, Philippines, UK, USA, Vietnam



Marina Bay Sands, Singapore

SINGAPORE TOURISM

A KEY DRIVER OF ECONOMIC GROWTH

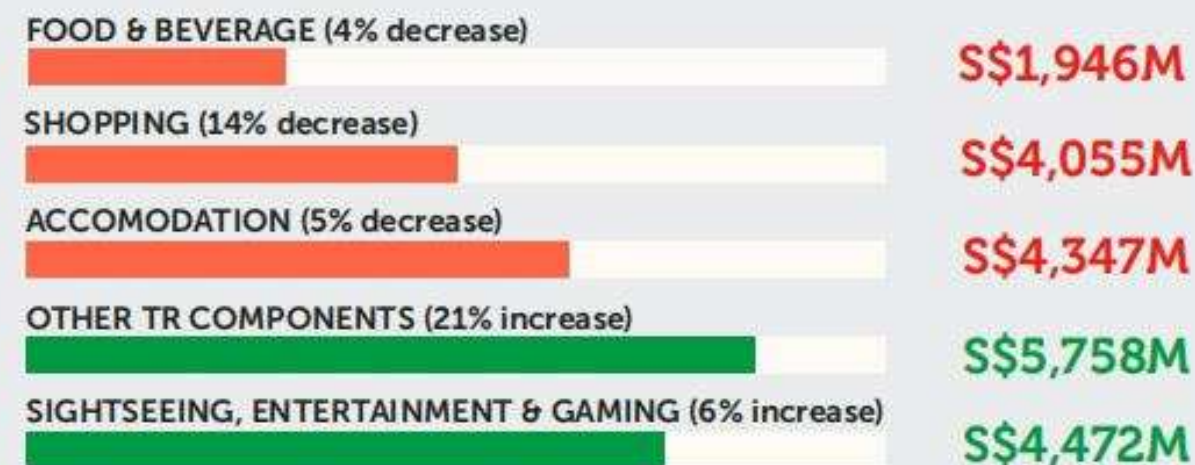
Tourism Receipts increased



Tourism Receipts in S\$ Billions (B)

¹Preliminary estimate for 2018

Growth in certain sectors offset mixed visitor spending



Tourism Receipts by Major Components in S\$ Millions (M), YTD 3Q 2018

* Growth in other TR Components was mainly from airfare revenue, with more visitors arriving via local-based carriers.



Universal Studios, Singapore

DUBAI: NUMBER 1 GLOBAL TOURIST DESTINATION

Dubai is renowned all over the world for its tourist industry. The industry is one of the significant contributors to Dubai's growth and prosperity. While Dubai has been attracting travellers from all over the world, at the same time it lures entrepreneurs and investors to earn and enjoy the vast opportunities of the travel industry.

Tourism is one of the major non-oil industries contributing to growth, prosperity and GDP of Dubai and the United Arab Emirates (UAE).

The UAE's ambitious economic diversification strategy has identified the travel and tourism sector as a significant development industry. Tourism investment as been one of the greatest contributing factors to the rapid growth of Dubai and the UAE as a whole, Dubai has also retained its top ranking as a Foreign Direct Investment (FDI) destination for tourism. This top rank as an FDI destination for tourism reasserts the significance of the industry's status as an economic force that presents great opportunities for steady and sustained returns to foreign investors.

Dubai attracted Dh83.5 billion in foreign investment through 205 FDI projects, providing more than 30,000 job opportunities.

UAE also made many legislative changes in more than 40 fields that positioned the country among the most competitive economies and easy-to-do businesses.



Dubai Musuem, Al Fahidi Fort,Dubai

DUBAI

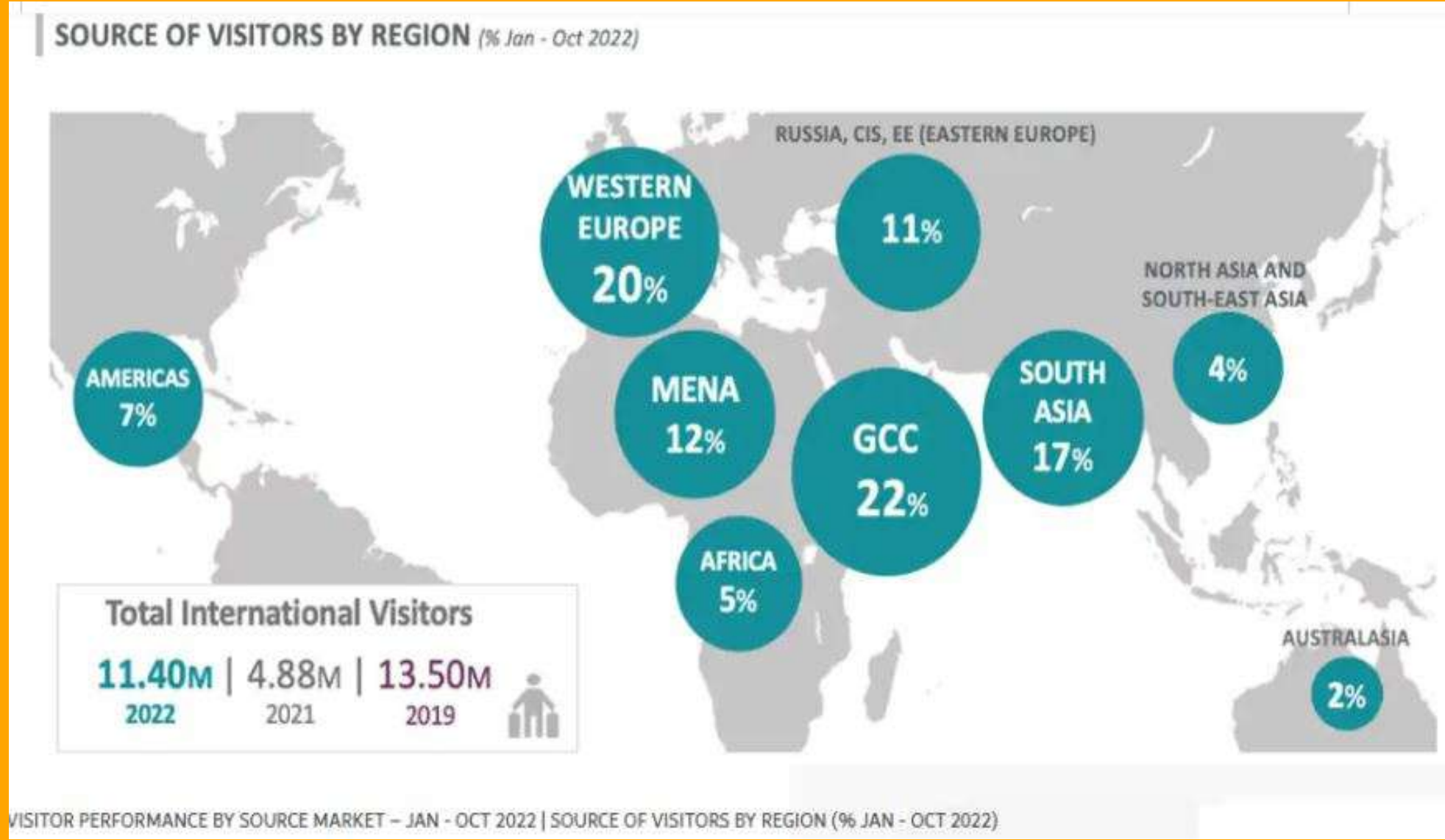
GLOBAL TOURIST DESTINATION

The local government of Dubai recognized decades ago that they could not rely on the surrounding Emirates for their oil and gas dividends and began the process to create a real tourist- driven economy. The concept that made Dubai successful was combining infrastructure, strategies, hospitality, and culture in a modern way to enhance the growth of the tourism industry. The government of Dubai has several initiatives in place to increase its tourism economy. Over the last decade, the government of Dubai has planned to maximize and maintain the circulation of foreign investment through tourism in Dubai into the United Arab Emirates, this can be seen through their various development projects and investment opportunities. Another such initiative is the Dubai tourism strategy of 2020, focusing on 20 million foreigners per year by 2020. The strategy was a success and extending it with new targets and goals were planned. Dubai is one of the most prioritized tourist destinations, it is expected to attract 21 to 23 million tourists per year, up to 23 to 25 million by 2025.



Burj Al Arab Hotel, Dubai

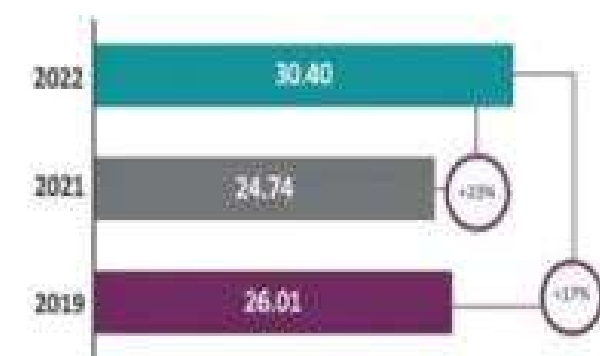
DUBAI WELCOMES 11.40 M OVERNIGHT VISITORS IN JAN - OCT 2022, WITH THE HIGHEST NUMBER OF INTERNATIONAL GUEST FROM INDIA AT 1.4M



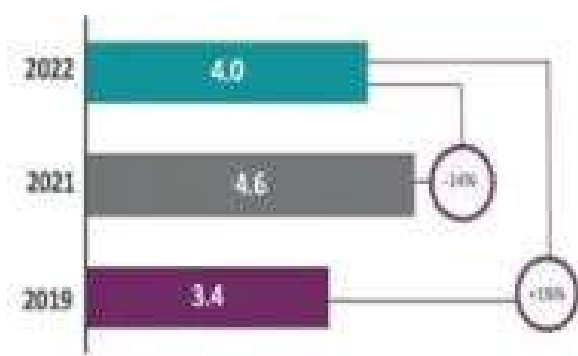
DUBAI VISITORS DRIVE ECONOMIC GROWTH IN HOTELS

DUBAI VISITORS DRIVE ECONOMIC GROWTH IN HOTELS (YOY Jan – Oct) 2022 2021 2019¹

Occupied Room Nights ^{Million}



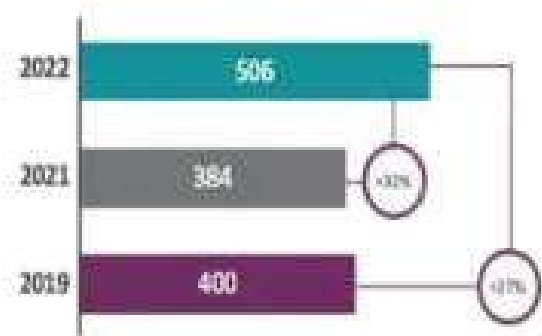
Guests' Length of Stay ^{Nights}



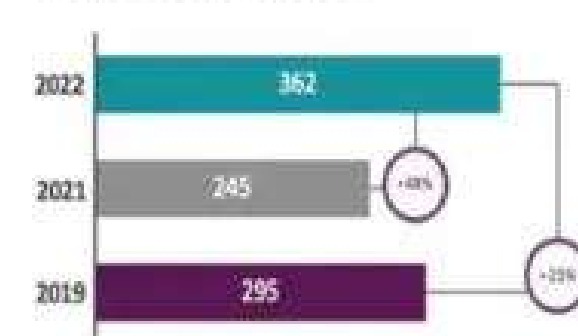
Average Occupancy ²



Average Daily Rate ^{AED}



Rev per Avail. Room ^{AED}



DUBAI

HIGHEST VISITOR RECEIPTS

Dubai ranks first in international tourist spending. According to the World Travel and Tourism Council (WTCC), Dubai earned \$29.4bn from international tourists in 2022

WTTC CITIES ECONOMIC IMPACT REPORT – EXECUTIVE SUMMARY

2022 International Visitor Spending (Forecast)	
Highest Visitor Spending (International Visitor Spend USD)	Most Recovered (Relative to 2019 levels in terms of international visitor spending)
1. Dubai \$29.4bn	1. Doha +21%
2. Doha \$16.8bn	2. Orlando +19%
3. London \$16.1bn	3. Antalya +15%

Burj Khalifa, Dubai

DUBAI IS 85% FOREIGN POPULATED

The population is composed of just 15% native residents, with the remaining 85% being composed of expatriates. About 85% of the expatriate population – or 71% of the total population -- is Asian, primarily from India (accounting for 51%). Other Asians in Dubai are originally from Pakistan (17%), Bangladesh (9%) and the Philippines (3%).



THE NEED TO STRENGTHEN TOURISM

Brunei is one of the richest country in the world, and has long been called the Gem of Asia. Shinning its light from the South East Asian region to the world, Brunei shimmered the nations with a rich legacy of the Monarch's stories of success in providing its people with an extraordinary quality of life. Over the years, the country felt the slowing down of its economy because of too much emphasis on the Hydrocarbon Sector. As a result of this high dependence on Oil & Gas, it shrank the contribution of other economic players to the country's Gross Domestic Product (GDP). As Dubai, Qatar and Saudi Arabia took-off with a successful economic diversification programs through tourism years before, Brunei is soon to follow and has the potential to overtake these successors.

Learning from these countries' experience on Tourism, it has been proven that this sector greatly contributed towards economic growth and job creation for oil producing and non-oil producing countries.

BRUNEI 2035



كمنتريڤ سومبرڤ اوتام دان قلنچوڠن

MINISTRY OF PRIMARY RESOURCES AND TOURISM

BRUNEI DARUSSALAM



An aerial photograph of a coastal city, likely Brunei, featuring a large bridge spanning a river, with buildings and greenery visible in the background.

BRUNEI MY SECOND HOME IN ASIA

A BEACON OF PEACE

A BEACON OF OPPORTUNITIES

A BEACON OF ENRICHED LIVING

- **ASEAN's widening middle class and their increased spending ability for business and leisure can greatly contribute to domestic tourism in Brunei.**
- **ASEAN's rapid infrastructure, service and industrial growth can bring additional revenues to the Island's new industrial center.**
- **Faster, easier and cheaper transportation and logistics from and going to the Island is an advantage for both tourist and investor due to the Island's strategic location.**

BRUNEI IS THE BEACON OF THE WORLD

The Beacon (Minaret) is a symbol of Divine Light which provides direction, hope and growth. It calls the faithful to prayer.

In a darkened place or in a sea of chaos, the beacon is a lamp which gives direction to a lost traveler.

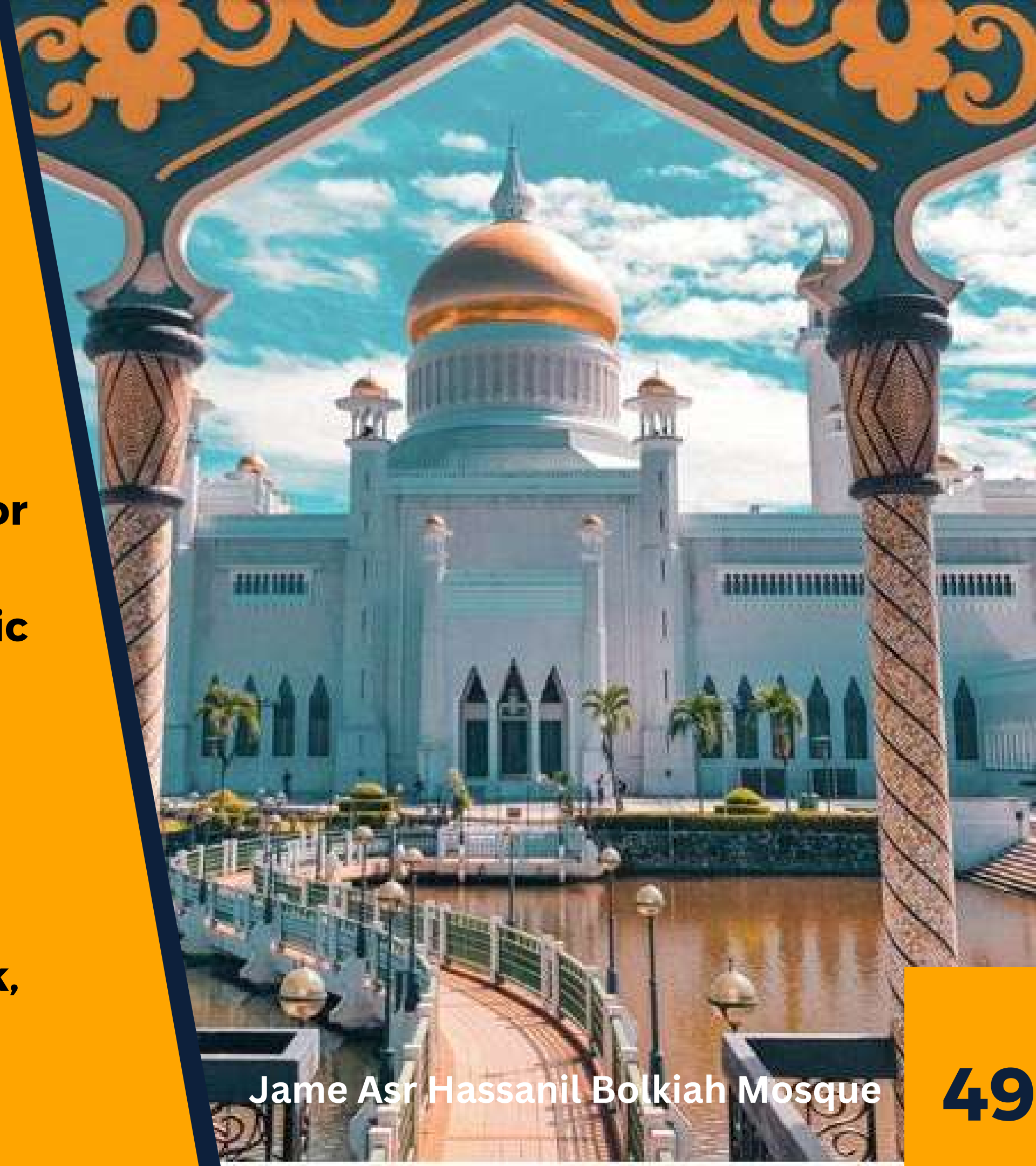
As long as you see the Beacon, you are certain that you are on the right path.



FINANCIAL CENTRE TOWER

BEACON OF PEACE

The Abode of Peace is an apt name for Brunei Darussalam. It is a country embraced by the hands of peace, stability and security. An economic strategic shift towards business and recreational tourism is highly favorable for Brunei as it is regarded as the world's most stable macro-economy by the World Economic Forum (GCI 2010/11). Brunei is ideally positioned as a destination for business, investment, and recreational activities. Historically, Brunei has an outstanding record of political stability and has been led by a benevolent monarchy that can be traced back, in an unbroken line of succession, over 600 years to the first Sultan in 1363.



Jame Asr Hassanil Bolkhiah Mosque



**United
Nations**

UN News

Global perspective Human stories

Brunei highlights importance of peace in development, in UN Assembly address



UN Photo/Cla Pak : Sultan Hassanal Bolkiah Mu'izzaddin Waddaulah of Brunei Darussalam addresses the General Assembly.

<https://news.un.org/en/story/2014/09/478782>

SPEECH OF HIS MAJESTY SULTAN HASSANAL BOLKIAH IN THE 30TH ANNIVERSARY OF BRUNEI'S MEMBERSHIP IN THE UN

Instability, injustices and increasingly frequent natural disasters are precluding the international community from achieving gains that protect people's welfare and the environment, the Sultan of Brunei said in his speech, calling on delegations at the annual United Nations General Assembly debate to take concerted, unified action.

He called on nations to work together to address problems aggravated by globalization and inter-connectedness, and highlighted his country's support for efforts that promote understanding, tolerance and respect among world communities.



A PEACEFUL COUNTRY WITH A PEACEFUL CLIMATE: BRUNEI OFFERS PEACE OF MIND FOR YOUR INVESTMENTS

In 2021, there were a total of more than 100 natural hazard events in Asia, of which 80 percent were flood and storm events. These resulted in almost 4,000 fatalities, about 80 percent caused by flooding. Overall, 48.3 million people were directly affected by these hazards, causing total economic damage of US\$ 35.6 billion.

In 2021, flooding caused the highest economic losses in China (US\$ 18.4 billion), followed by India (US\$ 3.2 billion), and Thailand (US\$ 0.6 billion). Storms also caused significant economic damage, especially in India (US\$ 4.4 billion), China (US\$ 3.0 billion), and Japan (US\$ 2 billion).

Brunei is typhoon-free with no recorded occurrence of earthquakes, tsunami or severe flooding. Brunei is a haven for your infrastructure.



Typhoon Yolanda, Philippines

BEACON OF OPPORTUNITIES

In January 2008, the Brunei Government released its Brunei Vision 2035 .(“Wawasan Brunei 2035”) the national long-term plan covers a period of 30 years, which sets out the overarching goal of delivering economic diversification by 2035 and the broad development strategies which Brunei will pursue over this period. Several proposed infrastructures will incorporate smart and green technologies. The development of this area would provide many economic benefits, including but not limited to, new infrastructures and development, growth of tourist industry, and the development and sale of real estate. It will also provide opportunities for commercial and residential development and in the process generate jobs, other investment, and income- generating opportunities, boost Brunei’s economy, and the entire ecosystem will be encompassed within a technologically advanced smart system.

HIS MAJESTY SULTAN HAJI HASSANAL BOLKIAH

CONCEPT PROPOSAL IN SUPPORT OF THE MEGA INFRASTRUCTURE PROJECTS OF THE KING’S VISION 2035

IN SUPPORT OF WAWASAN BRUNEI 2035



INVESTMENT HAVEN

- His Majesty Sultan's approval for land strata titles for permanent residents and foreigners. This gives investors opportunities to own Land Titles under their name for **SIXTY (60) YEARS** and can be renewed.
- Foreign Direct Investment Program for business investment; the Brunei local authorities and agencies will support, provide all assistance and advice to ensure a hassle-free investment process.
- No personal income tax, no sales tax, payroll, manufacturing or export tax.
- Similar to Swiss banking system. Your money is safe in Brunei banks.
- Approved foreign investors can enjoy a tax holiday of up to 20 years.
- Regulations relating to foreign participation in equity are flexible and in many instances 100% foreign ownership.
- Land ownership for foreign investors.



Brunei Land Application and
Registration Information System
(LARIS)

PRIVILEGED LIFE

Under the vision of His Majesty Sultan, the BM2H Program is designed to attract expatriates, wealthy business investors, and recreational tourists from around the world through Foreign Direct Investment. BM2H is an international residency program enacted by the Government of Brunei to allow foreigners to live in the country on a long-stay visa from 10 to 20 years and can be renewed indefinitely.

The BM2H housing program gives 20 year Visa. BM2Hers housing package starts at 500K to 2 M USD. BM2Hers are also entitled to buy one Halal Factory in the 1000 Building of the Halal Hub Industrial Zone. An immediate employment needed for 40 thousand unemployed Bruneians.



**1000 Offices & Factories,
Halal Hub**

BRUNEI: THE HEART OF ASEAN

Brunei is strategically located in the heart of ASEAN, where flight hours is just 2-3 hours away, train is interconnected to 4 countries and ferries and seaplanes can reach in just a few hours.



LOGISTICS CENTRAL

Trans-Borneo Railway will also help develop economic growth in the BIMP-EAGA region. To improve and facilitate free movement of people, goods and services in the Region. Making the best use of common infrastructure and natural resources.

Taking the fullest advantage of economic complementation.

To accelerate economic development in focus areas which, although geographically distant from their national capitals can create potential in supplying the export markets of ASEAN, North and South Asia, and the Middle East, following the expansion of land transport links and the development

BIMP-EAGA TRANS-BORNEO RAILWAY NETWORK



The Honorable President
Xi Jinping of China with
the Honorable President
Joko Widodo of Indonesia



The Honorable President
Xi Jinping of China with the
Honorable Prime Minister Dato'
Seri Najib Razak of Malaysia



BIMP-EAGA Transborneo Railway

CROSS ALL BOUNDARIES

The Plan is to develop and create an international airport and seaport for the new infrastructures, trade, and tourism that will result from such an extensive proposal. In addition, the planned collaboration for the Trans-Borneo Railway Network (TBRN) among Brunei, Indonesia, Malaysia, and the Philippines, will house its Terminal Hub and warehousing operations in this zone which will help foster free trade, cooperation, reduced logistical costs, increased employment, and enhanced government and business relationships for Brunei. With the projected increased number of tourists arriving in Brunei for business and recreational activities, a new airport facility is highly recommended. A cargo terminal will also be provided to handle 500,000 metric tons of cargo per year. It is anticipated that the new airport will be able to accommodate 3600 people during peak hours. The Zone 3 airport facilities will be able to cater to large Aircrafts such as the Airbus A380 and the Boeing 787



SEAPORT & HARBOR

- **International seaport near the industry parks for easy off-loading and loading.**
- **Ports serve as important transportation hubs that facilitate goods movement & distribution of freight (including raw materials, parts, and finished consumer products) by all modes of transportation including marine, air, rail and truck to businesses in local communities and worldwide markets**



Port of Shanghai, China

SEAPLANES

- One of the most common uses for seaplanes is air taxi service. Seaplanes are a unique and efficient way of getting from one place to another. The planes are able to fly low and fast. More significantly, since they can take off and land on water, seaplanes have more flexibility when traveling from the mainland to island tourism sites.
- In addition to taxi services, seaplane can offer scenic tours. Rather than using a seaplane simply for transportation, taking a scenic tour allows a bird's eye view of the surrounding area. Tourists can glide over the terrain and see stunning panoramas from above. The size and capacity of a seaplane make it possible to soar within range of some of the most spectacular sites in an area. Tourist can take amazing photos and film clips as seaplanes fly through the clouds.



Seaplane Carrier, Ikkhasas Hotel,
Perhentian Islands, Malaysia

YACHT CLUBS & FORMULA 1 BOAT RACING

- **The UIM F1H2O World Championship is the world's foremost international series of single-seater inshore circuit powerboat racing.**
- **Highly competitive, intensely challenging, risky and entertaining, inshore circuit powerboat racing is the ultimate adrenalin rush and regarded as one of the most spectacular and exciting sports in the world.**






Get Ready! F1 Power Boat Race 2023 Lake Toba, Indonesia #F1H2O

Share



Watch on  YouTube

BEACON OF ENRICHED LIVING

Anchored on these goals of the Wawasan 2035, The tourism sector aims to become a major contributor of growth to achieve these goals by proposing to promote the BRUNEI MY SECOND HOME PROJECT

- **Increased foreign investors lead to benefits for the construction economy, increased real estate development, and more jobs in Brunei.**
- **Increased investment staying within Brunei through foreigners and permanent residents.**
- **Brunei's stability, prosperity, excellent infrastructure, and strategic location within 10 ASEAN member countries.**
- **There is no import tax and other taxes for BM2H personal items when relocating to Brunei.**



Luxury Homes for BM2H Holders

NEW BLEISURE CENTER IN ASIA

Brunei Tourism Island will be the next location for Business and Leisure (BLEisure Destination) the biggest commercial center in Asia.

The Shopping Mall will have the biggest leasable space (25 hectares mall space) and is forecast to be the most profitable mall once fully operational. This will be the convergence of all the best, the most luxurious and most popular retail brands in the world.

Enjoy Duty Free Shopping all year round.

SM's business bright spot: Strong retail activity pushes SM net income 27% higher to PHP26B in H1

Wednesday, Aug 3, 2022



MALL OF ASIA

SM Mall of Asia Philippines

64

• BIGGEST ISLAMIC • UNIVERSITIES •

The world has many renowned places that are known for high-quality education, and as such, the proposed plan is to attract students to Brunei so that it too may be known as a destination for high-quality education. The plan will encompass hiring skilled professors, utilizing new technologies, smart and energy-efficient building materials, and providing space for teaching facilities as well as on-campus housing for students and faculty members.



**AL-AZHAR AL-SHARIF
ISLAMIC UNIVERSITY CAIRO**

• BIGGEST CHOCOLATE • FACTORY & MUSEUM •

As of 2023, the global chocolate industry is worth \$127.9 billion USD. Europe is the largest chocolate market, with \$45 billion in chocolate sales projected in 2022. Despite not growing cacao, Europe is responsible for processing 35% of the world's cacao. Aimed to gather all the Chocolate Makers and Chocolatiers from around the world to put up their chocolate factories in Brunei. The biggest Chocolate Museum shall exhibit chocolate history, milestones and chocolate products. The Museum will be just beside the Biggest Mall in Asia.

Out of the 4 Million tons of Cocoa beans that have been produced, just 3.1% of the world's cocoa is certified organic. Brunei aims to produce organic cacao and be the world's next organic Chocolate Giant.



BIGGEST CHOCOLATE FACTORY & MUSEUM

STATE OF THE ART MEDICAL FACILITIES IN A SEVEN STAR HOTEL (HOSPITELS)

Equipped with complete equipment in a central location in which all major operations can be performed and imagine all skilled physicians and surgeons can be accessed 24/7. There can be an arrangement with neighboring countries to fly in and out physicians and agreement to transfer patient from one country to another in a special bond arrangements



**The Royal Suite, MediClinic Hospital,
Dubai**

ENTERTAINMENT CAPITAL OF ASIA

The Tourism Island will be the next Monte Carlo of South East Asia.

With the numerous, biggest and most expansive seven star, five star and three star hotels. These Brunei Tourism Hotels shall have the most elegant and complete amenities so that guests from all over the world can enjoy.



Winstar World Hotel and Casino

BIGGEST FLORA & FAUNA GARDEN

The Island of Borneo, which is the 3rd largest island in the world is also home to the most diverse species of flowering plants in the world which has more than 11,000 species and 1/3 are indigenous.

The Dubai Miracle Garden, is the biggest flower garden in the world imports all of its flowers and arrange them in a 72,000 Square Meter Dessert Garden. Brunei Tourism Island Flora & Fauna Garden will leverage and feature the Island's beautiful floral diversity at a much lower cost than that of the Dubai Miracle Garden, it will also be the most natural.

It will also have the biggest Butterfly Garden in the world.



Dubai Miracle Garden

BIGGEST OCEAN PARK AND THEME PARK

Brunei Tourism Island Theme Park once complete, is set to be home to the world's largest and most expansive marine-life aquarium in Asia. A main focal view of the aquarium will present visitors with the “Endless Vista”, an impressive window across multiple levels revealing stunning aquatic scenes.

After enjoying aquatic scenes, tourists are set to splash in numerous pools, wave pools and giant slides for family fun and pleasure.

In the future, an underwater hotel shall be built.



Sea World Abu Dhabi

SAFEST SCUBA DIVING SITE IN THE WORLD

TWO BRUNEI BAY LEGENDS

Lumut Lunting and Piong-pilongan

Lumut Lunting is situated in between Pulau Sibungur and Pulau Berambang and is located at the mouth of the Brunei River whereas Pulau Piong-Pilongan is out in the sea just 1 kilometer away from Muara.

Both islands - Lumut Lunting and Pulau Piong-Pilongan have been associated with an old legend that stretched back in time to more than 500 years ago which dates to the first Sultan of Brunei named Sultan Muhammad. It has been said among the elders in Kampong Ayer dwellers that Lumut Lunting will never be under water no matter how high the water level rises.



SAFEST SCUBA DIVING SITE IN THE WORLD



BIGGEST FISH FARM IN ASEAN

In 2018, fish harvested from aquaculture around the globe amounted to 114.5 million metric tons, with an estimated first-sale value of US\$160.2 billion, consisting of 49.8 million tonnes of finfish (US\$99.2 billion), 16.1 million tonnes of shellfish (US\$19 billion), 6.9 million tonnes of crustaceans (US\$36.2 billion), and 7.3 million tonnes of other aquatic animals including frogs (US\$3.7 billion).

Global aquaculture production is dominated by Asia (92 percent) where China alone accounts for 57.8 percent. The biggest floating farm in Brunei will be placed near the scuba diving island.

On May 22, 2022, China operated the Guoxin 1 Vessel , the biggest floating fish farm in the world with an annual production capacity of 3,700 tons.



Guoxin 1 Vessel Floating Fish Farm, China

BIGGEST MUSEUM OF ARTS, CULTURE & SCIENCES

The biggest Museum in the World to be built in Brunei will be the ASEAN Convergence of:

1.ARTS - Performing and Fine Arts. Performing Arts of the past and the present. There will be an area where budding and renowned performing artists can showcase or launch their talent. A Fine Arts avenue will be an area where all the renowned and budding sculptors, artists and designers can showcase their art pieces for sale or for show.

2.CULTURE AND HUMANITIES - Literary pieces from ancient civilizations to present shall be exhibited, read as poetry and even sung. Book clubs can be launched for ASEAN Literature and studies. An ASEAN Institute for Culture and the Arts can be created.

3.ASEAN SCIENTIFIC MUSEUM - A showcase of the technological breakthroughs and contribution of the ASEAN Region to the advancement of Global Science and Technology.



Louvre Museum Paris

LUXURY HOMES

BM2H Luxury Homes shall include high rise luxury condominium, Villa in the Water (Floating Villas) and homes designed by prominent Architects in the world.



- **MIDDLE CLASS
RESIDENTIAL
HOMES** •

In order to capture the burgeoning and increasing middle class in ASEAN, the Tourism Island will offer High Rise Condominiums which will be built near the Halal Hub Factories.

MASTERPLAN:

RECLAMATION OF 1000 HECTARES

MIXED ISLAND DEVELOPMENT

ZONE 1: HALAL HUB/ COMPLEX

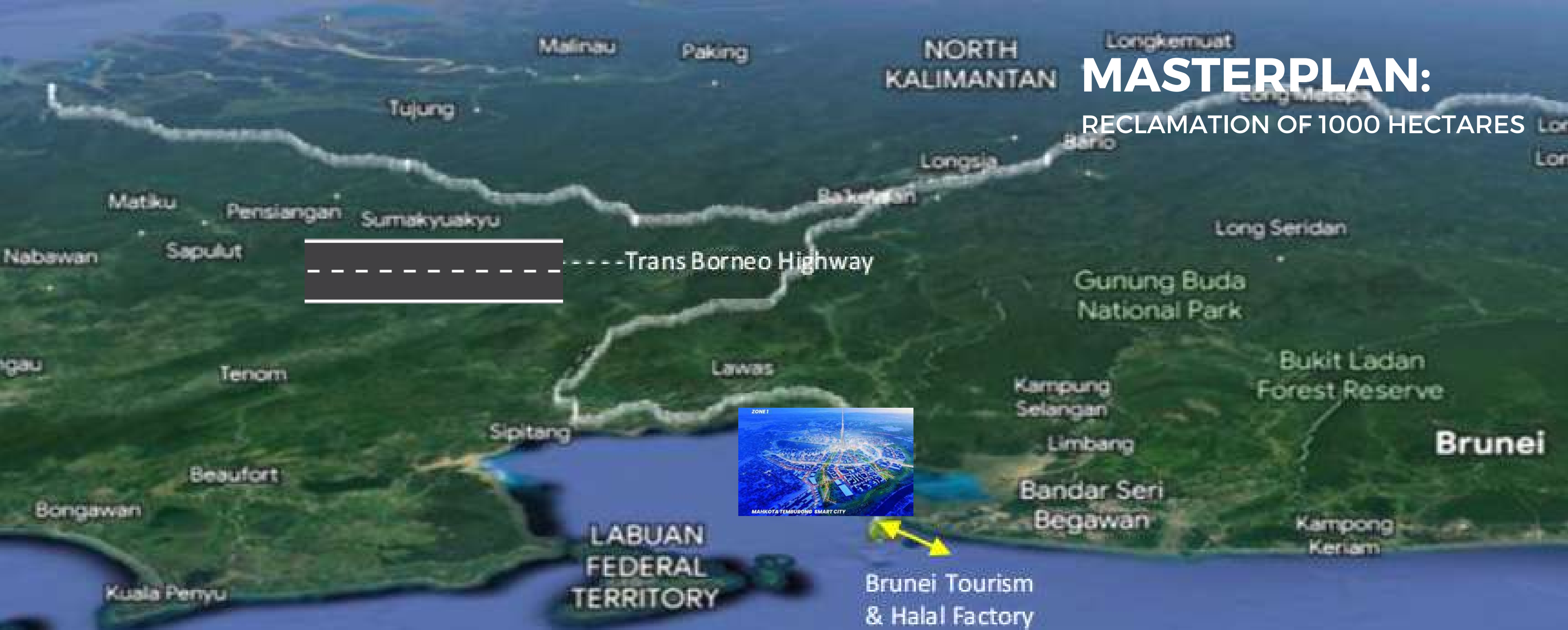
ZONE 2: ENTERTAINMENT CITY

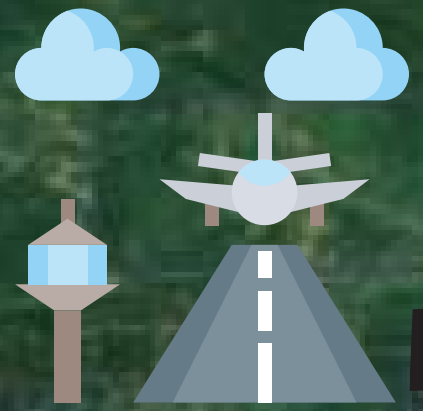
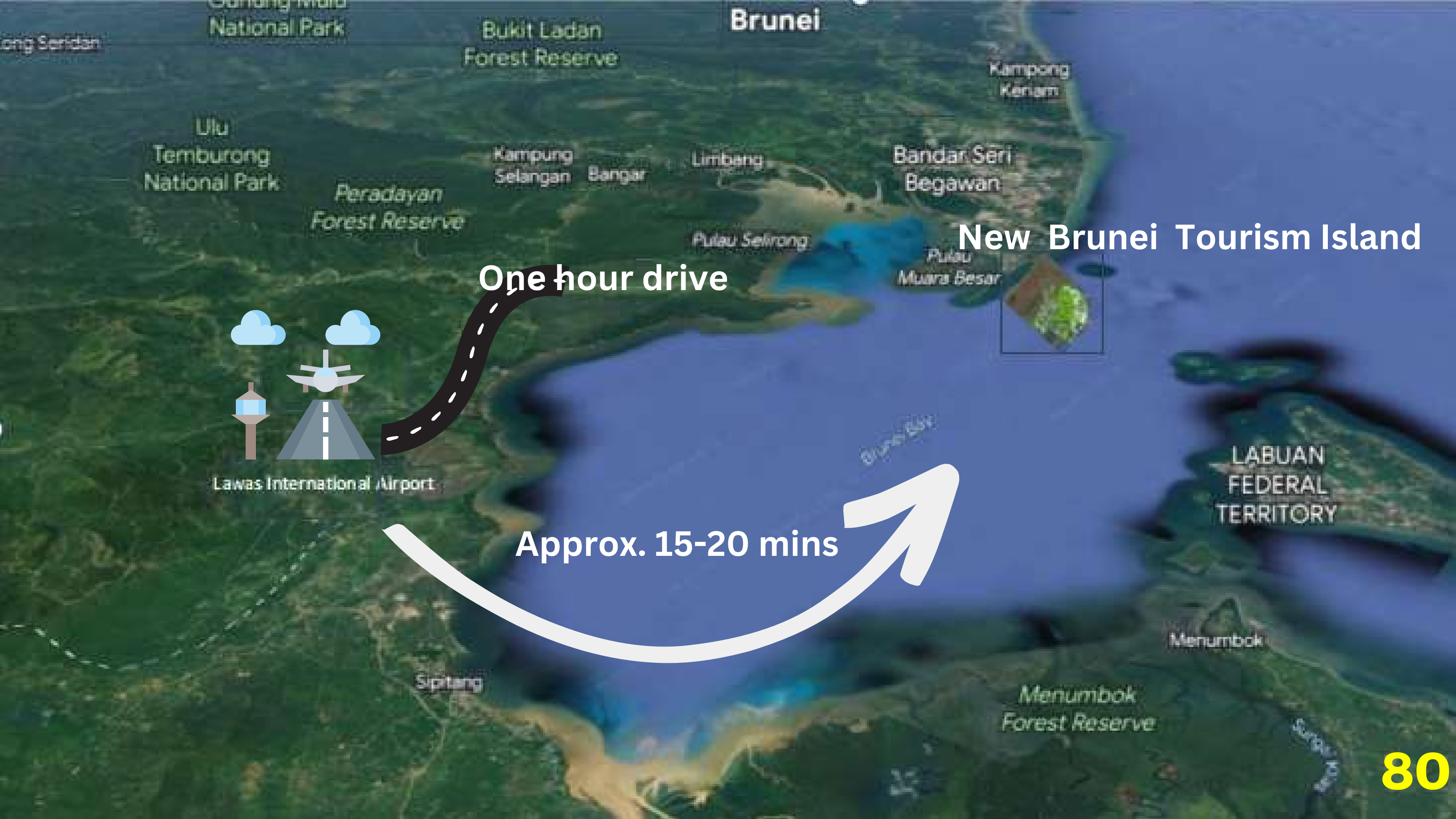
ZONE 3: RESIDENTIAL & COMMERCIAL CENTERS

ZONE 4: GOVERNMENT & BUSINESS COMPLEX



MASTERPLAN: RECLAMATION OF 1000 HECTARES





Lawas International Airport

One hour drive

Approx. 15-20 mins

New Brunei Tourism Island

LABUAN
FEDERAL
TERRITORY



MASTERPLAN:

MIXED ISLAND DEVELOPMENT

ZONE 1: HALAL HUB/ COMPLEX

ZONE 2: ENTERTAINMENT CITY

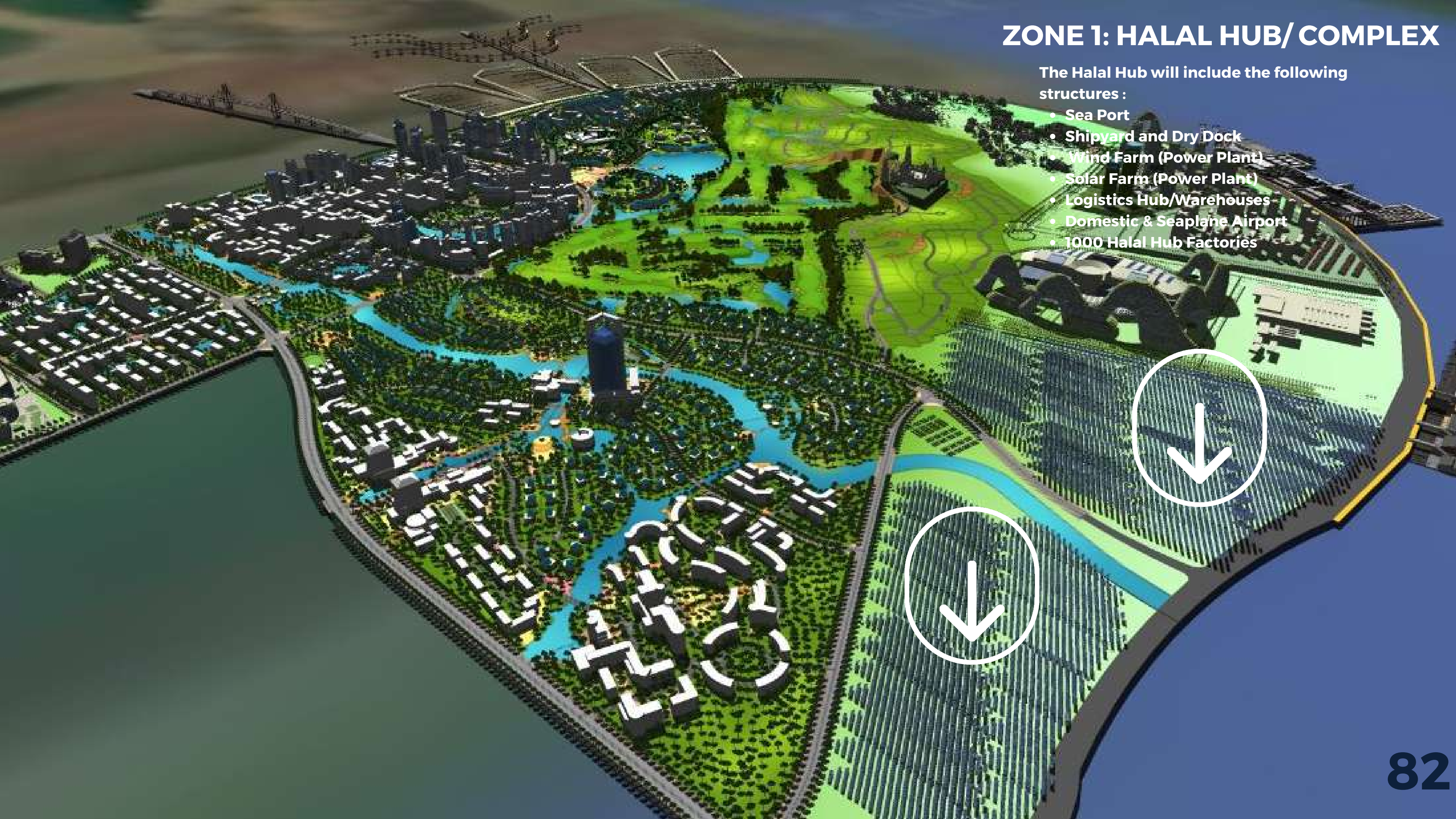
ZONE 3: RESIDENTIAL & COMMERCIAL CENTERS

ZONE 4: GOVERNMENT & BUSINESS COMPLEX

ZONE 1: HALAL HUB/COMPLEX

The Halal Hub will include the following structures :

- Sea Port
- Shipyard and Dry Dock
- Wind Farm (Power Plant)
- Solar Farm (Power Plant)
- Logistics Hub/Warehouses
- Domestic & Seaplane Airport
- 1000 Halal Hub Factories



ZONE 1: SEAPORT AND HARBOR



ZONE 2: ENTERTAINMENT CITY

The Entertainment City will include the following structures :

- 7, 5 and 3 star Hotel and casino
- Waterpark, Ocean park, Underwater Hotel and restaurant
- Yacht club, Island Resort
- Golf and Polo Club
- Brunei Musuem of Arts, Culture and Science, Coliseum
- Events Place and Convention Centers
- Resto-Bar, Karaoke Bar



**AMUSEMENT CENTERS,
WATER PARK & OCEAN PARK**



OCEAN PARK & UNDERWATER HOTEL



COLISEUM AND MUSEUM



RESORTS



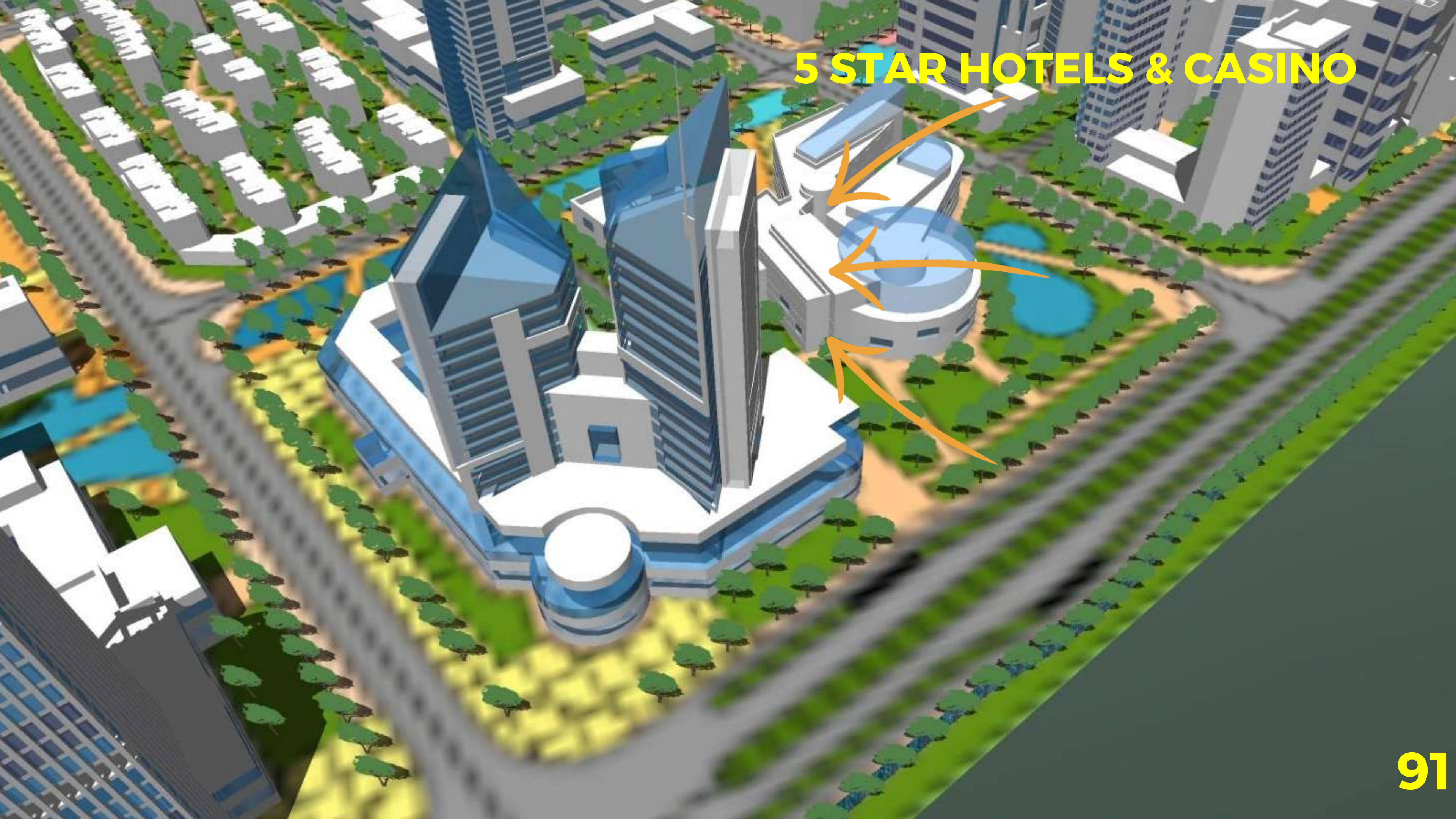
RESORTS



7, 5 AND 3 STAR HOTELS & CASINO



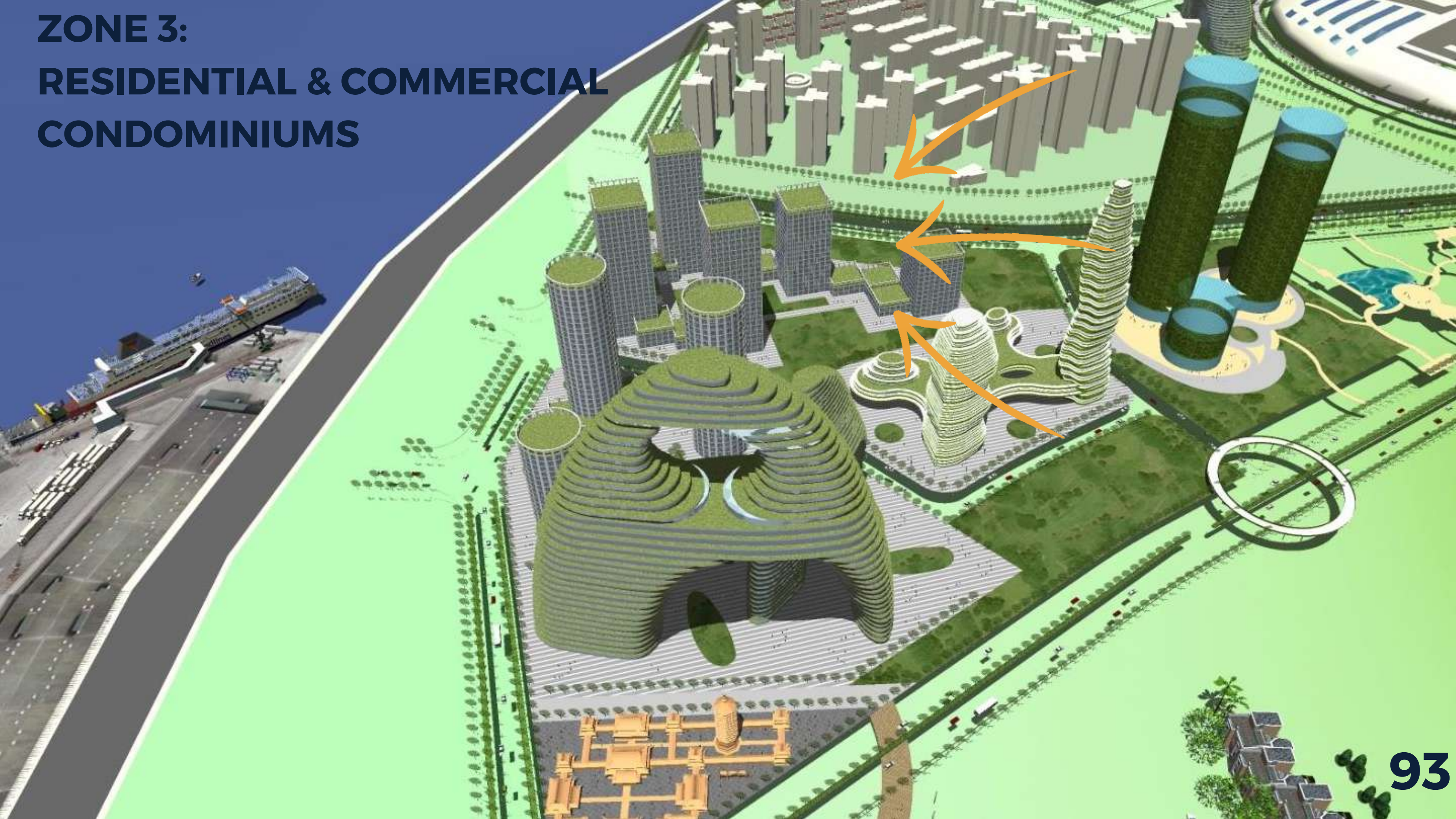
5 STAR HOTELS & CASINO



4 STAR HOTELS & CASINO



**ZONE 3:
RESIDENTIAL & COMMERCIAL
CONDOMINIUMS**



RESIDENTIAL & COMMERCIAL CENTERS



GOVERNMENT BUILDINGS & COMMERCIAL CENTERS



FLOATING VILLAS, YACHT CLUB, MARINA





FLOATING VILLAS

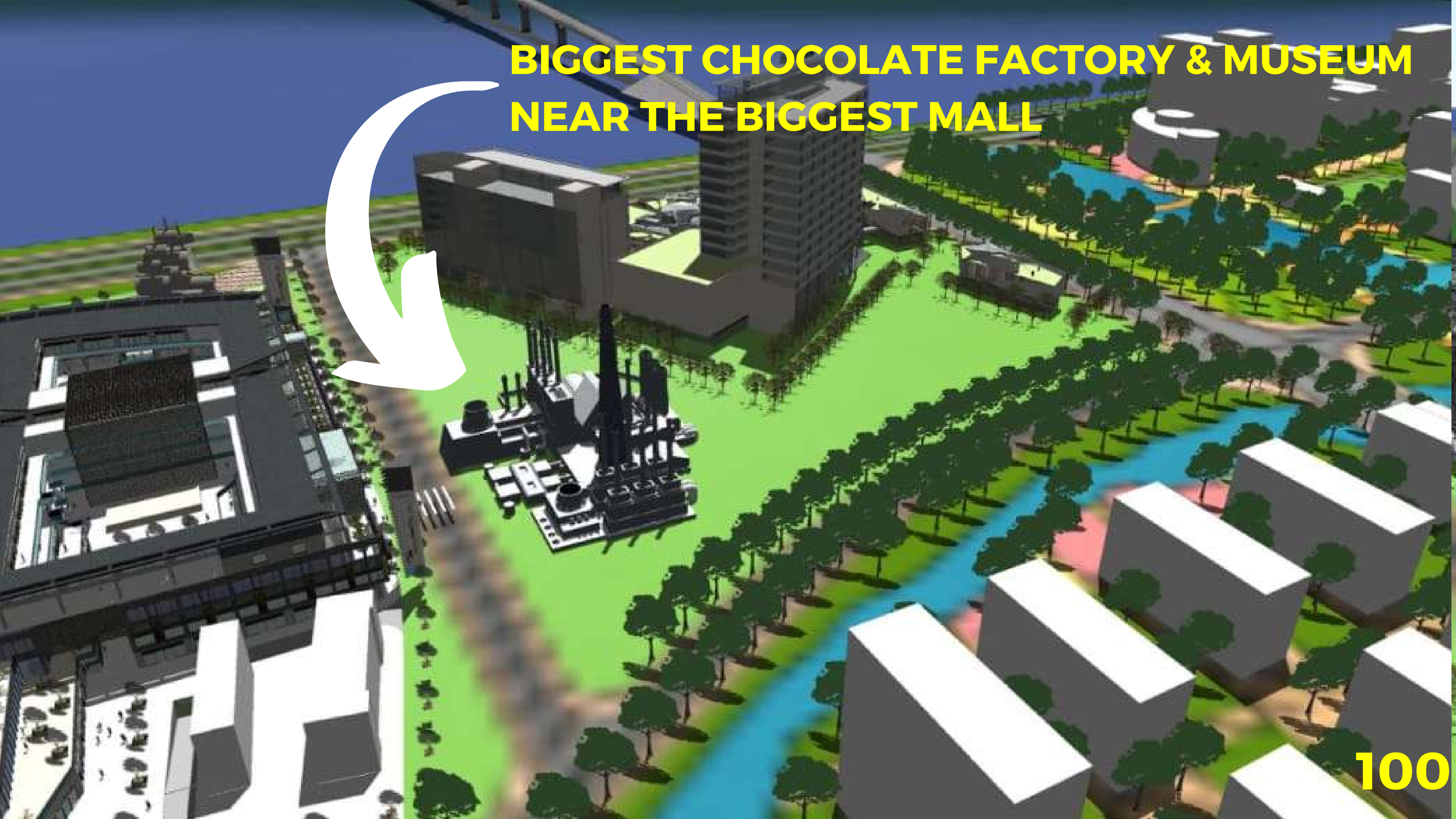
YACHT CLUB & F1H2O



BIGGEST SHOPPING MALL



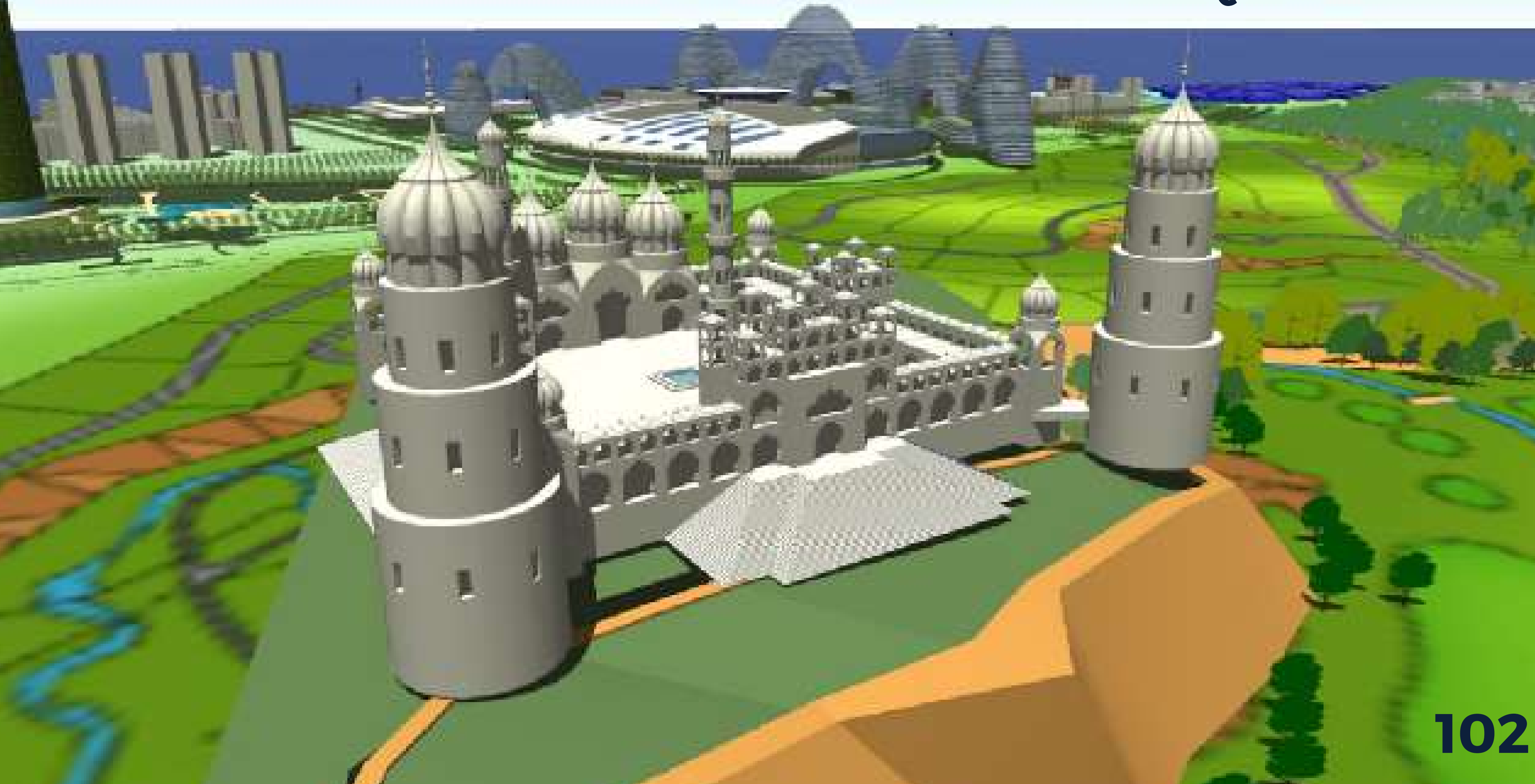
BIGGEST CHOCOLATE FACTORY & MUSEUM NEAR THE BIGGEST MALL



ZONE 4: GOVERNMENT & BUSINESS CENTERS



LARGEST MOSQUE IN ASEAN



TECHNICAL DESCRIPTION

3 PHASES OF THE PROJECT:

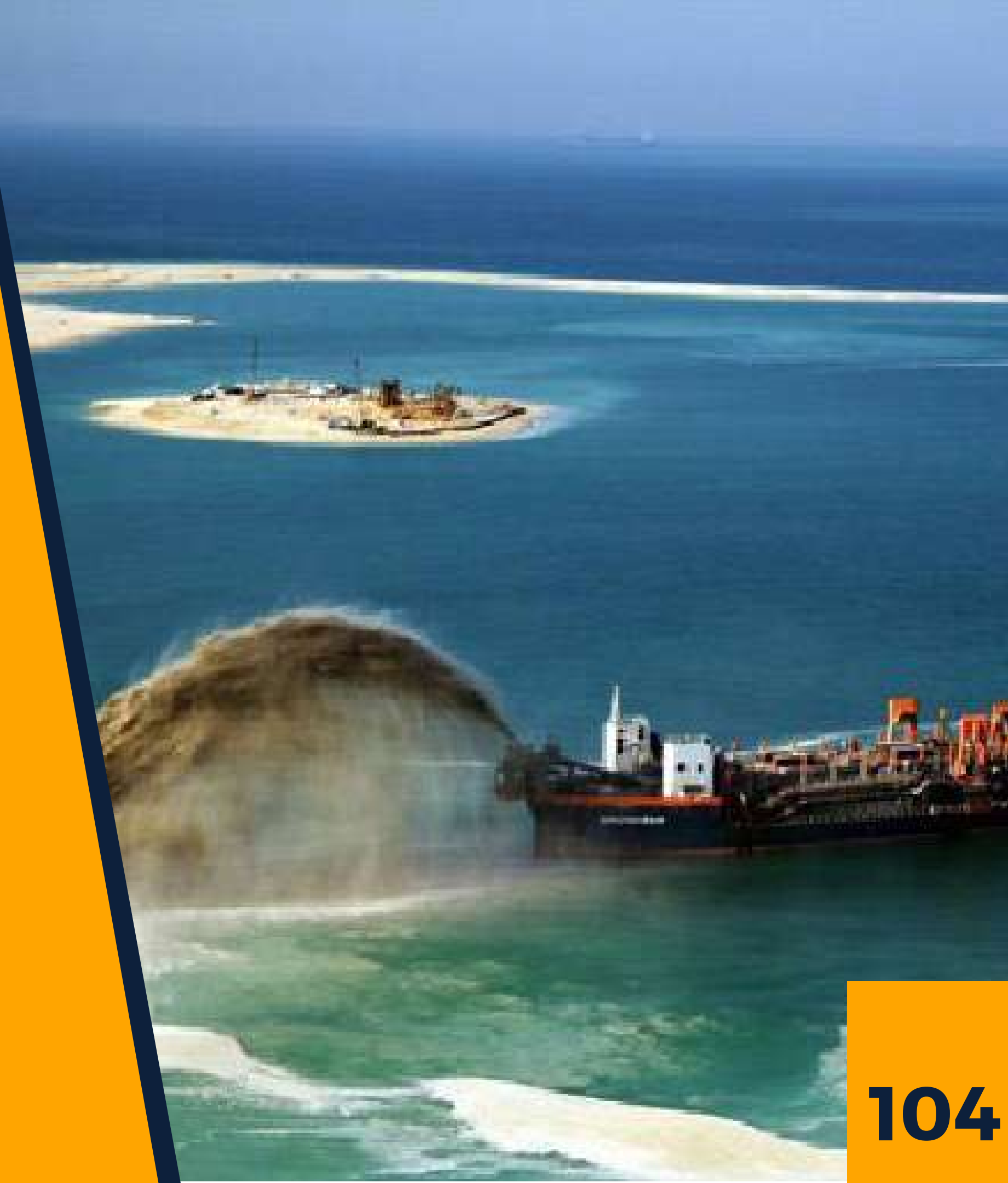
- I. LAND RECLAMATION
- II. LAND DEVELOPMENT
- III. BUILDING CONSTRUCTION



PHASE 1: LAND RECLAMATION

Land reclamation is strongly proposed to encompass the several infrastructures under the mixed development project to preserve inland areas and not disturb the region's urban planning and ecological systems. Its isolation also ensures that the cultural and religious peace of the local population is protected and maintained.

The reclaimed area, will surely an island wonder, thanks to the combination of amazing architecture and advance technology. Furthermore, all infrastructure will be built and sustained based on the idea of green and smart environment.



PHASE 2: DREDGING

Dredging is the maritime transportation of natural materials from one part of the water environment to another by specialised dredging vessels. In a usual dredging cycle, self-propelled ,trailing suction ,hopper dredgers, barges and other ships spend the majority of their time sailing back and forth between excavation sites and placement sites, transporting materials between the port and the borrow site; sailing between borrow sites; and sailing from sites where material has been extracted to unloading or placement sites.



PHASE 3: CONCRETING

Construction including construction ashore and in-site wherever possible.

Transportation including transportation of the structure or a part of the structure from shore to sea, or from shore to barge, open-sea transporting and mooring operations.

Installation : Installation of the structure at its final location , ie. Period of start of submerging from transport position or launching from barge, including piling, grouting or anchoring, until the platform is ready for normal operation.

Operation : The period from completed installation till decommissioning or removal from location

Retrieval : Includes retrieval or removal of the structure.



Terima kasih!



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